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CONTENT EXPERIENCE AND CONTENT STRATEGY

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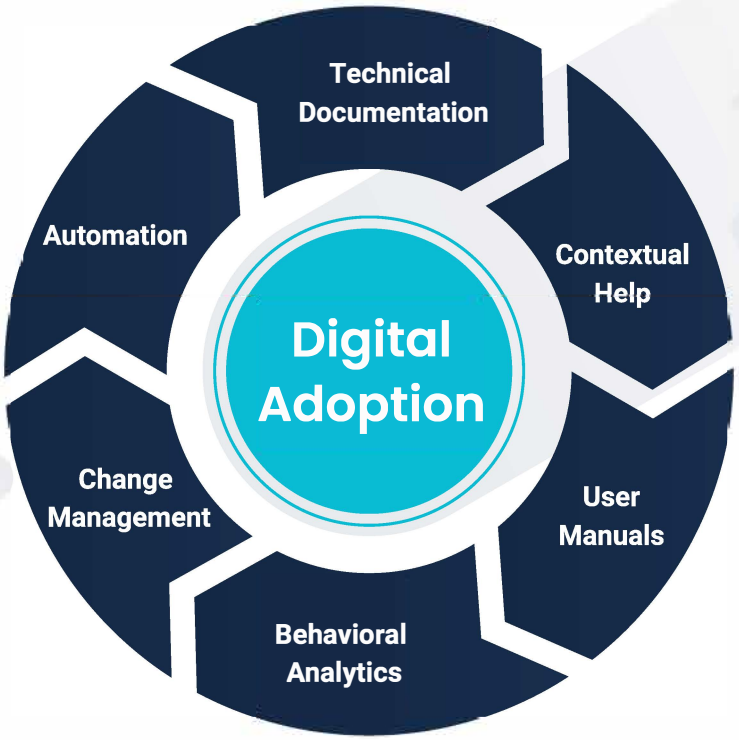

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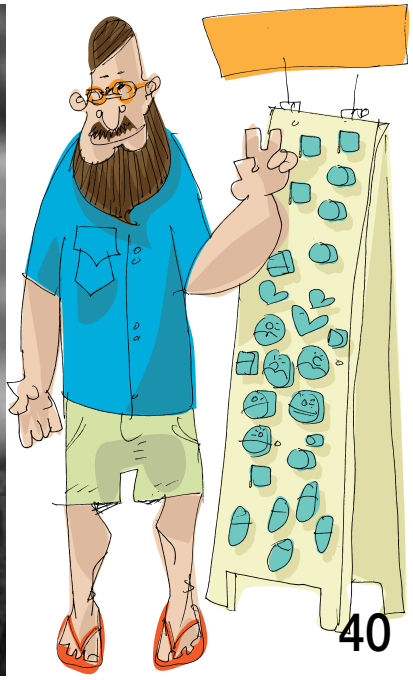

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A Note from the Editor

I MUST CONFESS to a significant bias around this month's theme. I believe that the most important thing that content professionals can do is create the right *content experience*—defining when, where, and how content is delivered to the consumer—and the only way to do that with high success and excellence is to deliver content according to the right *content strategy*—in other words, determining what information is appropriate for which audience(s) and why. If the consumer can't find the information, or it appears to them at the wrong time during their activities, or it is not what the reader needs to know … if any of these are true, the content itself isn't used or appreciated. And users aren't successful.

I could write a book (and maybe I will!) about content experience and content strategy, but for now, I will let the authors of this issue dispense wisdom in *their* words about various aspects of this theme.

An issue about content strategy would not be complete without a contribution from Ann Rockley, often referred to as the "mother of content strategy." In "Ensuring the Success of Your Content Strategy Through Effective Change Management," she and Charles Cooper bring change management to the fore and discuss how important it is in implementing any new initiative.

In "Measuring and Advancing Your Content Strategy Maturity," Carrie Hane, Dina Lewis, and Hilary Marsh discuss a very interesting model for assessing content strategy maturity in associations that is easily applied to a commercial venture as well.

Beverly Brown uses an enlightening case study to compare scaling content strategy in small businesses versus large.

In "The Content Audit: Who Should Conduct It?" Isabelle Sperano and Robert Andruchow take a deep dive into their findings after studying 200 publications in content strategy. Their findings provide insights into the skills and experience of the content auditor.

Alan J. Porter launches his discussion of "The Customer Experience in a Culture of Assumption" with a familiar joke opening line, but he's *not* kidding.

And finally, Richard Rabil, Jr. provides fodder for the best business case for content strategy—how content and content strategy contribute to revenue generation—in "Content Strategy in Action: Enabling Sales with Product Documentation."

This month, our columnists are bringing you discussions about everything from mental models to mindset—and of course, a little bit of content strategy and experience. And be sure to check out the information about the new STC Roundtable in the Society Pages. It's free for April, and the topic is content experience and content strategy!

Content strategy and content experience is ripe for exciting, engaging, and maybe even controversial conversation, so engage us in conversation! The feature authors, columnists, and I provide our email addresses so that you can get in touch. We can also discuss articles and issues with you online—did you know that you can comment on the Web version of any article? We're hoping you'll start or join a conversation! Until next time, enjoy the issue!

Andrea Ames

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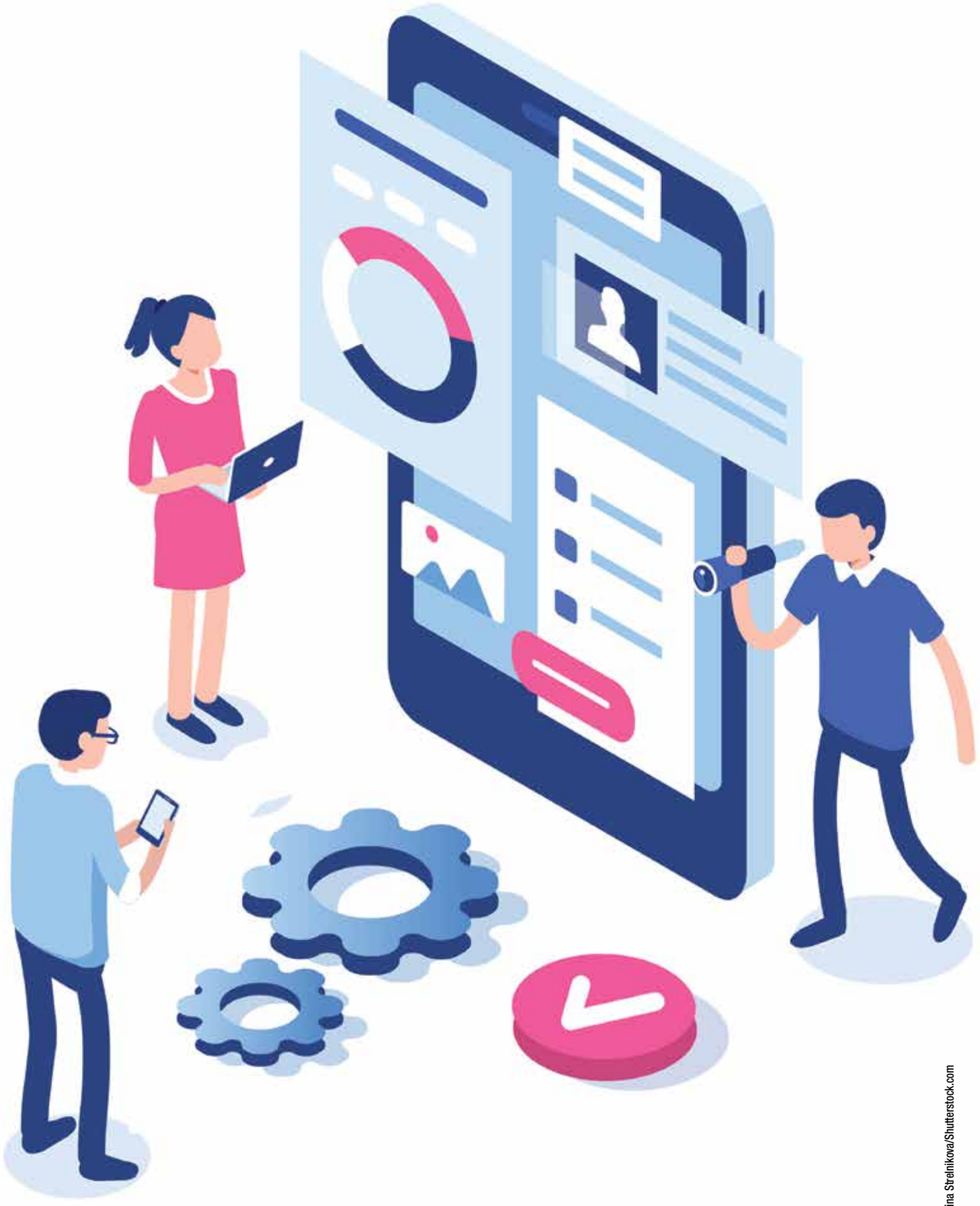

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Ensuring the Success of Your Content Strategy through Effective Change Management

By ANN ROCKLEY | *STC Fellow, and* CHARLES COOPER

WHEN AN ORGANIZATION develops a content strategy, they typically put considerable effort into the strategy and spend significant amounts of money on the supporting technology—but if that's where it stops, the project is likely doomed.

An effective content strategy requires effective change management.

Without an effective change management strategy, people will return to their old habits using new tools, resulting in increased rather than decreased costs. Opportunities like omnichannel, dynamic delivery, augmented and virtual reality (AR and VR), chatbots, and artificial intelligence (AI) require adherence to consistently structured content with robust metadata, and any lack of rigor in the implementation of the content strategy will jeopardize these opportunities.

The most likely reason for a project to fail is the lack of an effective or incorrectly focused change management effort.

Change management is a big bucket term, and it encompasses a lot, but too often, we find change management focuses too much on technology or is aimed too closely at one department to the exclusion of others. Good change management is inclusive; it focuses on explaining the "reasons why," rather than just the "how to." Good change management is two-way and participatory, rather than top-down and one-way. It encourages and actively seeks out input from those affected by the ongoing changes, and utilizes that information to improve the project. When implementing a content strategy, the biggest, hardest-to-deal-with changes are actually cultural changes—not technological changes. Good change management will work to address these changes.

When we speak of two-way communication, we're really focused on multiway communication. If you look at any organization, you will see that there are multiple types of silos—business divisions, departments, content silos, country and region silos, tool silos, etc. Not only does the change management committee need to speak to each of these groups, they also need to ensure that the people in those groups can speak to each other to improve the system.

Communication

Communication is critical to successful change. You need to communicate the reasons for change, your plan, and the project's status. Projects that are developed under wraps are viewed with suspicion. Lack of communication results

in anxiety and starts rumors. The longer that information is withheld, the more anxious people will become and the harder it will be to convince them of the need to adopt the change. Communicate as early in the project as possible, and continue to communicate throughout.

Develop a communication plan to help keep everyone aware of what's going on.

Communicate to many diverse groups within the organization:

- **Authors:** Ensure they understand what is happening, the benefits of the new processes, and what to expect.
- **Reviewers:** Ensure they understand how the review process will change and the benefits to them of these changes.
- **Stakeholders:** Ensure they understand how you are effectively supporting their needs.
- **Management:** Ensure they understand what is happening and the ongoing value of the work being accomplished. Communicate to your management's management and their management—up as many levels as you can—to create awareness, increase corporate knowledge of value and key concepts, and gain greater acceptance across the organization. Create a top-level presentation that your management can present to their peers.
- **Peer groups:** Communicate to peer content groups in other parts of the organization to raise awareness of the goals and benefits. They may want to partner to provide the same content strategy to their teams. Partnering to share costs and processes can be very beneficial.

Communicate appropriately depending on the phase of the project. In early stages, communicate:

- **Organizational challenges, goals, and benefits:** Help the organization to understand the challenges being faced, the goals of the content strategy to address these challenges, and the expected benefits.
- **Top-level understanding of the content strategy:** Get more specific to identify how the content strategy will address areas such as the channels, audiences, and the overall vision.

As you begin to roll out the project through proofs-of-concept and pilots, communicate:

- **Why change:** Communication plans frequently only tell people what's happening and what they have to do; they don't tell people why it has to be done. When people don't understand the why, they may resist the change.
- **How it will affect them:** Let people know how the changes will affect them. You know, and they know, there will be changes. Be up front and honest about the changes. If you're not, they imagine the worst.
- **The plan:** Explain your plan, including an approximate timeline for implementation. This gives people an understanding of the scope and timeline for the project.
- **Ongoing status:** Keep people up to date as the project progresses, even if only specific groups are involved in the beginning.
- **Problems:** No project is without its problems. People hear about the problems even if they aren't directly involved. It's better to be honest that there was an issue, and then tell them how it was addressed. This ensures that they know that the team is working hard to make the project a success.
- **Successes:** Ensure that you communicate the successes you've achieved. Success is positive and makes people feel good about embracing the change.

After the project has begun, communicate:

- **Successes:** Similar to how you communicate success during the early stages, ensure that you communicate the successes you've achieved on an ongoing basis. This ensures that the strategy continues to be successful. When projects go quiet, you lose awareness in the organization, and the project might not continue to be perceived as valuable.
- **Return on Investment:** Nothing speaks louder than showing how content strategy resulted in reduced costs and timeframes and increased income and customer satisfaction. Don't do it just for one or two years; keep track of accumulated return on investment for the length of the project. Organizational structures change, and having solid data available ensures that you can show long-term value and worth.

Training and Support

When companies implement a content strategy, it's often all about the tools, and people only get trained on how to use the new tools. But it *isn't* all about the tools; it's about the content and the people who create it. Concept training is critical to success; if your authors only know how to use the tool, but not what to put into it, the quality of your content will suffer significantly. Provide the following types of training.

Authors:

- Training on concepts of structured content
- How to write to structured content models
- Writing minimalist content
- Writing to support deliverables (chatbots, omnichannel, different audiences)
- Writing for reuse
- How to effectively use metadata to support content retrieval, both from the CMS and at the point of delivery

Reviewers:

- Training on concepts of collaborative review
- Training on concepts of structured modular content
- How to review reusable content
- How to review channel-neutral content

Once they have the concepts, you can provide how-to tools training.

Provide support throughout the rollout process, ensuring that there is a support structure in place to help answer questions and make decisions when design decisions need to be adapted, and when there are problems with technology performance.

Governance

Too often, organizations look at governance as a four-letter word—something to be avoided in polite company and only brought to bear in the most dire of circumstances. They see it as something that will slow them down and establish barriers to producing good content. In reality, the reverse is true—it permits a clear path for content creation and provides consistent answers and strategic direction for content into the future. You have to determine the scope of the governance, but that should be determined as part of the overall content strategy. For example, governance should address:

- **Content models:** Content models guide the creation of structured content. Consistent models are critical to content reuse and for supporting adaptive content. Changing the models arbitrarily will result in reduced or even full loss of automation. Work with the content creation teams to ensure that models remain consistent and are implemented consistently.
- **Authoring guidance:** Authoring guidance helps direct the author in creating structured content. Structured authoring guidance should be managed just like editorial guidelines.
- **Reuse:** A reuse strategy identifies what types of content will be reused and at what level of granularity, as well as how to support authors in easily and effectively reusing content. Governing reuse ensures that reuse is optimized and arbitrary variants do not propagate throughout the content set.
- **Workflow:** Workflow guides the content through its lifecycle—from design and creation all the way to publishing. You can't manage your workflow on an ad hoc basis. Like any part of the content creation process, it must be governed.
- **Taxonomy and metadata:** Taxonomy and metadata (which are best described in tandem as "structured information about information") are at the heart of all search capabilities. Traditionally they've been focused on either the content creator, as they look for content to reuse or repurpose, or on the end user, as they search for published content. But the real growth today is on allowing algorithms (AI and ML and chatbots) to find content and serve it up in a personalized format to the end user. Without the consistency in tagging that can only be maintained by governance, the content will be stuck in manual mode—it will decline in value, and you won't be able to use it to its fullest extent in the future.

Each of these needs to be governed. The governance processes must take into account both day-to-day issues and long-term strategic concerns. Some companies set up one governing body for each of these areas, others combine them into a larger body with wider responsibilities. Either way, it's important that there be a significant level of communication between the people involved to ensure that the process fulfils your organizations' needs.

Look to your existing processes and procedures to see if there are already systems in place that can be used (either as they are, or more likely, with some modification) to provide the governance you need.

Bringing it All Together

Effective change management incorporates focused multi-way communications, ensuring that everyone is aware of the purpose and direction of the project. It requires training—not only so people understand the technology, but to assist content contributors, reviewers, and stakeholders to understand why the process has changed, how to create effective structured reusable content, and the value of metadata in delivery optimization and automation. Deep support is required to assist in the transition, to troubleshoot problems, and identify best practices. Finally, governance is required to ensure that standards and guidelines are consistently followed and any changes are reviewed and approved—not just on a day-to-day basis, but on a long-term, strategic basis.

As content strategy becomes more the norm rather than the exception, effective and strategic change management is required to support the business and cultural changes within an organization. Only with this in place will a content strategy implementation succeed in the long term.

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Measuring and Advancing Your Content Strategy Maturity

By CARRIE HANE, DINA LEWIS, and HILARY MARSH

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IN 2017 AND 2018, we conducted a major study of content strategy adoption and maturity in associations. Associations are a perfect place to study content strategy, because they are in the content business, providing value to members through content, such as educational programs, member resources, advocacy efforts, publications, and conferences.

The American Society of Association Executives (ASAE) Foundation (the research arm of ASAE) commissioned this study to answer a question: how are associations managing the challenges and changes in how they create, facilitate, curate, and disseminate knowledge and learning through content?

Part of the challenge is that the term "content strategy" itself can mean different things to different people. For this study, content strategy is defined as:

> The planning and judgment for the creation, publication, dissemination, and governance of useful, usable, effective content across departments and functional areas.

While much focus on content strategy has been on websites or digital ecosystems, content is substantive information produced and delivered using any medium. In associations, almost every department produces content to help members advance their knowledge, grow in their careers, or support their industry or profession.

Content strategy helps an organization prioritize and plan what types of content to produce and how to deliver them for the best value. Content strategy is not just a document to have; it is a set of practices and principles that get infused throughout the entire organization. Incorporating content strategy into standard operating procedures is critical to an association's success.

When an organization has a holistic content strategy:

- Each piece of content produced has an explicit, measurable goal tied to a specific outcome of the program that the content is about and a clearly articulated audience.
- Content is created in a way—terminology, readability level, format, length, timing, etc.—that resonates with the audience.
- The people with expertise in creating, publishing, and promoting content work in partnership with subject-matter experts managing the organization's programs to ensure that the content about and from those programs achieves its goals.
- The organization evaluates content to determine whether the content meets its goals, and that information drives decisions about what to do more of, less of, or differently.
- Subject-matter experts work in partnership with each other to determine when to collaborate, when to cross-link, and when to reuse content that another department has created.

Getting to a place where all these conditions can happen requires a collaborative rather than a competitive or conflicting culture. It requires trust and shared responsibilities among program-focused departments and between subject matter experts and content experts. And it requires that content-related responsibilities become part of the job descriptions of each person who plays any part in the organization's content.

Research Methodology

The study gathered data through a comprehensive literature review, national online surveys, and in-depth interviews. All told, we reviewed 68 articles, reports, and presentations about content strategy and associations created between 2010 and 2017; more than 600 people took the surveys; and we interviewed more than 30 association staff members and content strategists.

Content Strategy Tactics

In order to quantify adoption and maturity, we broke content strategy down into a number of tactics:

- **Content analytics:** Tools for measuring content usage.
- **Content audit:** An inventory and analysis of the content an organization produces.
- **Content governance:** A set of policies for creating, publishing, and managing content.
- **Content job descriptions:** Ensuring that if a staff member's job responsibilities include creating or managing content, their job description includes those responsibilities.
- **Content models/structured content:** Breaking content into individual elements and publishing it in a structured fashion, enabling content to be reused across any interface, print or digital.
- **Content planning calendar:** A central calendar where all content creators record their content plans.
- **Content strategy statement:** An organization-wide mission statement for content.
- **Customer journey maps:** Customer journey maps outlining the audience's journey from awareness through loyalty and engagement.
- **Digital content training:** Ongoing training for all of the organization's content authors about digital content best practices and how to write digital content.
- **Editorial style guide:** A document outlining the organization's editorial style.
- **Personas:** Representations of top-priority audiences that describe the audience's goals, needs, and context for content.
- **Search engine optimization:** Strategies and tactics to ensure that the organization's content is found on search engines.
- **Stakeholder interviews:** Regular interviews with staff and/or volunteers to define and update the organization's business and content needs, objectives, and challenges.

- **Taxonomy/metadata/controlled vocabulary:** A list of terms that enable the organization to categorize content in a common way.
- **Usability testing:** Quantitative and qualitative methods of measuring content usability and satisfaction.

These tactics served as a baseline for evaluating how associations adopt content strategy. Through the survey responses and interviews, we assembled clear pictures of organizations' content strategy journeys and the factors influencing what they do and how far they can go.

Maturity Model

Content strategy is a set of practices rather than a single action or document. This research identified a three-level spectrum of maturity (see Table 1):

- **Beginning**: Organizations that have recognized the need to approach content more strategically and are using 1 to 6 tactics in their content strategy practice.
- **Intermediate**: Organizations that have shifted from planning to implementation and are using 7 to 13 tactics.
- **Advanced:** Organizations that are focused on the environment, collaboration, and continually iterating, and are using 14 or more tactics.

Most organizations practicing content strategy are at the intermediate level. According to our initial survey, 35 percent of associations are at the beginning level, 55 percent are at intermediate, and 10 percent are at the advanced level.

You can assess your organization's content strategy maturity using this downloadable Microsoft Excel assessment tool: *https://bit.ly/cs-assessment-tool-2018*.

Plotting your content strategy maturity based on the number of tactics your organization uses (with greater weight on three tactics: analytics, governance, and content planning calendar) will help you understand where you stand now and where you might go next. While the steps are similar, each organization travels its own path toward greater maturity.

Beginning Level

At this level of content strategy maturity, the content strategy champion—an individual or team—is trying new ways of doing their work, but largely under the radar. They can do what they want, as long as they meet goals established by the budget or strategic plan and don't shake things up too much. The champion is often in charge of the website, social media, marketing, or communications. Producing or managing content is part of their job, which means they have latitude to do it in a way that they think fits the organization.

Champions usually start by creating alignment and consistency through a content planning calendar (66 percent), content audit (56 percent), controlled vocabulary (40 percent), customer journey map (33 percent), or content governance (25 percent). As they gain confidence and build success, they find allies in other departments who want to get the same results. The spark ignites and spreads. Sometimes champions do a pilot effort and then get official responsibility for creating a content strategy practice within the organization.

Two common catalysts for content strategy are (1) a new top executive whose strategic vision includes a content strategy and (2) deciding to redesign the main website. Because an association's website is the face of the organization, Web content changes affect how content is created in every medium and channel.

Content strategy champions in associations beginning the journey are plotting a course, matching content priorities with business priorities and clearly defining what content strategy means for them. As they start to gather successes, champions educate others about what they did

Table 1. Association Content Strategy Maturity Model (© The ASAE Foundation)

	Beginning	Intermediate	Advanced
Culture (How an association's people interact to get content strategy work done)	**Organic**	**Cooperative**	**Collaborative**
Mood/Mindset	Excitement Aspiration	Uncertainty	Accomplishment
Sustainability	Buy-in Establish roles	Accountability	Integrated Outcome-focused
Operating Mode (How content work gets spread throughout the organization)	**Planning**	**Execution**	**Iteration**
Scaling	One person or department	Multiple departments—creating alignment	Organization-wide—making dynamic connections
Optimization	Tactics Establish metrics	Workflows Channels Analyze (use) metrics	Process Data-driven
Focus (How strategic the association's content strategy work is)	Tactics	New models Building bridges	Environment Outcomes

and how it benefited members, staff, or the organization as a whole. Communication—up, down, and sideways—is essential to gaining traction and buy-in.

To be able to measure progress, organizations set specific, reasonable goals and start collecting analytics. Optimization starts with having baselines for where the association is, how much time it takes people to create content, and how content is used.

The focus is on tactics, although tactics are the ways in which the plan is enabled, not the strategy itself. The key to gaining traction and moving to the next level of maturity is shifting the association's mindset. The staff is going from constantly churning out siloed content that competes for members' attention against other siloed content to deliberately producing content that is of value to members. As the collective mindset shifts to a more strategic approach, and as more people buy into having a content strategy practice, the organization uses more tactics and starts to change.

If you are at a beginning level, a possible starting point is reporting on website traffic data, including the top pages viewed, every month.

Intermediate Level

As content strategy gains momentum, an association adopts more tactics. People begin to see good things happen and are eager for more. At this stage of content strategy maturity, associations start to become more transparent and cooperative. People and departments work together to plan and develop content. They may create cross-departmental working groups to gain more traction for a strategic approach.

The primary challenge at this stage is organizational culture. Not everyone in the organization is ready to do things differently. The support—or lack of it—that the champions and their teams get determines whether the association can continue to mature. And while buy-in exists at the top, the champion has to remind people regularly of the strategy and why they are doing it. To continue to mature, executives must hold people accountable for the results the content achieves and empower the champion to shepherd the strategy through education and enforcement.

The top tactics used by organizations at this level are a content planning calendar (90 percent), regular content audits (81 percent), a controlled vocabulary (79 percent), personas (73 percent), and having content strategy in people's job descriptions (65 percent).

Intermediate-level organizations may hire a content strategist or director. The organization starts to use the analytical data they've been collecting to make better decisions about content. They evaluate new ideas against the strategy. This is evidenced by the large proportion of intermediate-level organizations that have content governance policies for creating, planning, and managing content.

Cross-functional teams plan content, review data, and share best practices and successes. Knowing what is getting traction, what people are using for keyword searches, and where Web traffic is coming from helps improve content's effectiveness.

This can mean some resistance from parts of the organization. Many organizations are used to trusting each department head's instinct about what members want, and they base their team's content creation on those instincts rather than on data. When the data comes in and shows that some types of content are not resonating for as many people as instinct indicated, the producers of those content types get protective for fear of losing budget or staff resources.

In membership organizations, it can be tricky to say that one member segment or type is more important than another. But part of having a content strategy is conducting the research to inform staff about who the audience really is, not who the staff want it to be.

To advance to the next level:

- Add more sophisticated tactics, and combine their use into effective strategies.
- Experiment and revisit approaches that don't work.
- Maintain the conscious decision to engage in an association-wide approach to meeting member needs.

Advanced Level

The content strategy at an advanced association is integrated, outcome-based, data-driven, collaborative, transparent, and mission-oriented. Associations at this level are collaborative. People work together with shared goals, no longer operating in hierarchical organizational silos.

At these organizations, the content strategy champions feel a sense of accomplishment and have the confidence to keep going. They track what works, repeat successes, and start anew when things fail. The organization's mindset has shifted.

Content strategy underpins every department's work. The vision is defined, and the staff implements it together. Because content strategy connects with the association's mission, it is more sustainable. Those who create content have goals beyond merely getting the content out there. They can plan and create content more purposefully, because they understand what draws attendees to the conferences, what members in special interest groups are trying to achieve, and what segments of members are actually interested in. Content governance standards have been adopted by 97 percent of advanced organizations.

Because the association organizes around topic areas rather than departments, content creation and management are more efficient and effective. The senior leadership team champions content strategy. CEOs of advanced organizations measure content strategy success by looking at whether their programs succeed, not website page views or Twitter likes.

Some common measurements of content strategy include:

- Higher use of specific association offerings (participation in programs, use of resources, knowledge about key industry issues, etc.)

- Association growth as measured by increased membership acquisition and retention
- More positive feedback in member surveys
- Higher attendance at meetings, courses, or webinars
- Higher participation in legislative calls for action
- More active involvement by members who value the association and its community

The content operation is organization-wide. Coordinating content with business processes can still be a challenge, but the organization is driving toward dynamic connection among staff centered on the members and an understanding of the industry's issues.

Content strategy tactics have become repeatable processes. With people largely aligned, the organization can coordinate more types of content, including webinars, journals, magazine articles, and conference sessions. Since iteration is accepted, it becomes easier to add new things and people without breaking anything or starting over.

The association takes its analytics to a new level, mapping data to key performance indicators (KPIs) or objectives and key results (OKRs). Decentralized content decisions are possible, because everyone knows and understands the strategy. The content strategy champion's education efforts have paid off. More people—staff and members—add knowledge and ideas to the content conversation.

At the advanced level, the organization is a supportive environment that encourages learning and transparency, which benefits the staff, the association, and members alike.

Your Content Strategy Journey

Even if you don't work at an association, these lessons are likely to apply to your organization. You can strive to make content strategy part of the way your organization works, bring together people from disparate parts of the organization to collaborate, identify goals and success metrics for content, and share best practices. Sometimes it's best to start creating content more strategically alone or with like-minded colleagues, and then get buy-in from management for a new approach.

Assess where you stand and go from there!

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CASE STUDY: Scaling Content Strategy

By BEVERLEY BROWN

Any content plan should be developed with the purpose of helping a business, however large or small, to achieve its goals by enabling the creation of compelling content for its customers.

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THIS ARTICLE OFFERS a comparative case study on content strategy for a small business versus a large enterprise. The results demonstrate that there are several broad areas to be considered when developing a content methodology, including resources, systems and processes, technology, structure, guidelines, and tools. Although there are differences in the way content creation is executed in organizations of differing sizes, there is a basis on which principles can be applied across all companies to enable the development of content at scale.

It's enlightening to work as a content strategist in organizations both large and small, to have the opportunity to collaborate with stakeholders, and to align the content strategy to meet the business need. It's also fascinating to learn how that approach differs from one company to another, whether there are common factors which are shared by all organizations and what can be determined by comparing and contrasting the approaches taken by different-sized businesses.

Here we consider business-to-business (B2B) and business-to-consumer (B2C) companies and their approach to digital content delivery—that is, an overarching view of all types of content that are consumed digitally, and all collateral that has an impact on a company's digital content presence.

Content is a key business asset, sitting at the heart of an organization, whatever its size. The approach to content can influence not only its ideation and creation across the board, but also how it should be structured and deployed from a technical perspective. The principles described here of a content strategy and how best practices are applied in the context of a small business and a large enterprise are drawn from real-life experiences. Broadly, the case study examples comprise:

Company A: A European-focused composite of two companies with differing approaches to content creation—including in-house writers, contractors, and subject matter experts—with either limited (European only) or no translation requirements. Employees number 150 and 4,000.

Company B: An amalgam of two international organizations, with large teams of content writers, content managers, and content designers, translating their content into 20+ languages for customers in hundreds of countries worldwide. Employee numbers are around 18,000 and 95,000.

Content strategy is a core element of organizations implementing digital transformation, change management, or governance programs. The ongoing evolution of digital content requires a collaborative mind-set and a willingness to interact with multiple functions and stakeholders across the business as the discipline continues to evolve and gain credence.

From Concept to Reality

Any content plan should be developed with the purpose of helping a business, however large or small, to achieve its goals by enabling the creation of compelling content for its customers. Collaborating with stakeholders across the business to gain clarity on the organization's vision enables a content strategist to define a clear approach. This shouldn't be a complex process for Company A or Company B. The difference arises when a company starts to consider the scale of the content. Scaling up the various elements while retaining quality involves a number of factors, including:

- The volume of content to be created
- Taxonomy required to support findable and searchable content elements
- The capabilities of the team creating the content
- The technical or non-technical nature of the content being created
- Content management system (CMS) specifications (i.e., how and where the content is stored)
- Editing, checking, and regulatory requirements
- Collaboration with UX, design, testing, and subject matter experts
- Tools and automation available to support content creation

Structuring Content for Scalability

The creation of thoughtful content offers businesses flexibility around content creation, findability, and delivery. Artificial intelligence (AI) and cognitive computing have impacted the content discipline, increasing the awareness of the need to structure the content so that it is future-proofed and can keep pace with the evolution of content consumption on a wide variety of devices and in many formats.

On a small scale, Company A isn't impacted as it stands, but should it choose to grow and expand into new markets, it won't have the technology in place to seamlessly scale up. Company B, however, has realized that the technology infrastructure can offer an effective solution to scalability, and by implementing a long-term content strategy, they can, to a large extent, mitigate many future delivery issues and take advantage of opportunities arising as new technologies are developed.

Structured content is an ideal way to prepare content for future opportunities, as each element has its own field in the CMS, enabling full reusability. Creating discrete components, with a solid naming convention, enables total flexibility in the way that content is deployed. This enables the delivery of engaging content which is focused on specific user types, products, and lifecycle stages. In effect, this is a headless CMS where the content is stored independently from the presentation layer and is delivered to users with the format being applied during the publication process.

Content Strategy Best Practices

The tools in a content strategist's toolbox should include the following resources, regardless of the size of the organization:

- Style and tone of voice guidelines to ensure that the content is on brand and aligned with the company's purpose
- Terminology glossary, including company- and industry-standard terms, acronyms, and abbreviations
- Guidance on writing in plain English, including writing for translation and search engine optimization (SEO) best practices

These tools and applications can be scaled to take into account the specific needs of an organization, depending on how and where that content will be deployed.

Style and Tone of Voice Guidelines

Tone of voice reflects the language used and the manner in which the business is perceived by the audience segment consuming an organization's product and marketing content—in other words, what you say and how you say it. This guidance should be used by all organizations, from the smallest Company A to the largest Company B.

As organizations move toward short-form content that is findable and usable on a wide variety of devices, it is key to their success that they raise customers' perception of their trustworthiness. From a content perspective, one way of achieving this is through adherence to the tone of voice across all content and all formats—not only the written word, but also interactive and visual content.

Terminology Glossary

Terminology has a marked impact on the consistency of the content being produced across all channels. There is a correlation between the clarity of content and the engagement of an organization's customers. If authors have access to a term database that they can use for reference, there will also be a noticeable increase in the speed of content creation.

Once set up, the majority of terminology glossaries aren't time consuming to administer. They can be scaled up for different-sized organizations. Small businesses may find it useful to store the data in a spreadsheet. This was the approach carried out by Company A. Larger organizations should consider an in-house database. Multilingual requirements can be supported by some of the available tools that guide content authors through term management, tone of voice, and style guidelines in more than one language. This was the approach followed by Company B.

Writing Plain English

In order to remove any friction and to enable customers to consume content quickly and easily, remember that you only have a few seconds to capture their attention, and follow some common-sense rules, including:

- Write with an active voice.
- Involve the audience.
- Break the content down into succinct messages.
- Making the content easy to navigate and benefit-led.
- Avoid creating barriers that might be created by using colloquialisms, abbreviations, and confusing acronyms.

This guidance should be followed by all organizations, regardless of scale.

A note on translation and localization: When translating content, plain English (or the chosen source language) is the basis of any straightforward translation. When localizing content, countries or markets may each require a unique approach to capture their audience's attention. Tone of voice is not ubiquitous, and some locales might require a formal tone, while others allow a more relaxed approach. This level of attention to detail is required by Company B if its content is being created for international markets.

Lessons Learned

The basic principles for content strategy are shared across organizations of all sizes. However, the rigor in the way that best practice is applied varies from business to business. This variation is largely out of necessity, and includes:

- Company A doesn't have the resources to implement technology supporting content creation at volume. Conversely, they don't have the day-to-day need for it, and they are able to bring in additional resources on a per-project basis.
- Company B requires robust processes and systems that, together with automation, enable the management of a higher volume of content with a more complex structure.
- Company B is also more likely to take advantage of the external tools available to support content creation at scale.

When it comes to resourcing the content function however, there are many similarities:

- Both Company A and Company B have a core team of Content Managers and Content Writers with some additional technical support, for example a Content Architect.
- For digital transformation, website rewrites, and other significant projects, most businesses use the services of contractors, consultants, and agencies. They bring on board Content Designers, Editors, Writers, Strategists, and Project Managers, and they outsource translation and localization tasks.

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The Content Audit: Who Should Conduct It?

By ISABELLE SPERANO and ROBERT ANDRUCHOW

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A CONTENT AUDIT is an assessment method widely used in content strategy to identify, describe, quantify, and evaluate the content quality of a website or of a larger information space (social media, Web application, newsletter, intranet, etc.) (Abel and Bailie 2014; Halvorson and Rach 2012; Land 2014). The use of content audits has grown in the last several years, mainly due to the increasing complexity of digital information ecosystems (websites, social media, wearables, etc.). To this day, very little research has been conducted on this method. However, the content audit is widely described and discussed in a large body of literature, mostly written by content strategy, information architecture (IA), and user experience (UX) professionals (Sperano 2017). These publications can constitute a rich ground for initiating a more formalized reflection about this method. This realization led us to a further examination of a corpus of 200 publications (books, Web pages, blog articles, journal articles) about content audits. These results are part of a larger study about content audits that aimed to present an in-depth examination of them as a digital information assessment method. Many dimensions of the method were analyzed (audit definitions and types, audit activities, audit criteria, etc.).

In this article, we focus on one aspect of the study: the auditor. What is their field of expertise, and what are their required characteristics and skills? Because auditors are the main actors in charge of conducting a content audit, they are also largely responsible for the quality and the credibility of the audit results (ISO 19011 2011). This confers to them great power, as well as a large responsibility. As Land points out when talking about the auditor:

> By the end of a content audit, you will probably know more about the content on the site than anyone else in the organization. You may be the only person whose knowledge spans all the organizational content silos. This puts you in a position of power. If you can back up your story with data and informed analysis, you can move change forward (2014).

This is what led us to focus on the different characteristics, expertise, and skills of this central actor.

An Auditor's Field of Expertise

The professional skills needed to carry out a content audit are indirectly addressed in the corpus through the identification of the fields of expertise that come into play when setting up, executing, or presenting an audit. This aspect is addressed in 49 publications of the corpus (24.5 percent of the publications).

Information Architects and Content Strategists as Auditors

Two fields of expertise stand out among the 49 publications: information architecture (22 publications, 11 percent of the publications) and content strategy (20 publications, 10 percent of the publications). However, there seems to be no consensus on how these two fields of expertise come into play when conducting a content audit. Some authors grant the central role to the IA professional:

> The IA on the project normally does the content inventory, so I'm not suggesting here that this be taken over by the content strategist entirely. In performing the content inventory, the IA not only learns about what content is on an existing site, but also how the site is structured and a lot about the business. It's an important job for an IA to perform. But it is certainly not unheard

> of for a content strategist to help out with this very tedious activity to speed up the process (Sheffield 2009).

In other publications, authors suggest that the content strategist should be responsible for the content audit.

> Usually, the content strategist or content manager sets the scope and starts the spreadsheet at the highest levels. If the project (unfortunately) does not have a content strategist or content manager, the task falls to the information architect or other team member (Marsh 2012).

Sometimes, it is suggested that both fields should play an equal role:

> If your site uses a content management system, a content strategist works closely with the information architect (on smaller teams, this can be one and the same person) to first identify all the different content types a site has and then determine which content types go on each page (Lopuck 2012).

And in other cases, both fields are identified but seem to be conducting different tasks:

> Perhaps you're an information architect who wants to get a sense of the overall structure. […]
>
> Are you a content strategist […]? […] In addition to the structure of the site, you may be assessing the different content types and the relative quantity and depth of types ("Website Content Audits").

Other commonly identified fields of expertise are content manager (13 publications, 6.5 percent of the publications), Web designer (7 publications, 3.5 percent of the publications), and site manager (7 publications, 3.5 percent of the publications).

Client as Auditor

We observed in the 49 publications that the client is identified as an auditor in some cases (6 publications, 3 percent of the publications). Anderson et al. even identify the client as the sole auditor.

> This task is best done by the client, because they know their content best (Anderson et al. 2010).

Others identify the client as the main actor responsible for the audit.

> Ultimately, the content audit is the client's responsibility. You may have to help with this, but only the client can truly analyze their own current content and determine what needs to be rewritten or created from scratch (Goto 2005).

Several factors may influence the role given to the client. The goal of the audit, the size of the organization, and the amount of content to audit could influence the client's responsibility in conducting the audit.

Necessary Level of Expertise

The level of expertise required for conducting a content audit is very weakly addressed through the corpus. A few publications, however, refer indirectly to this dimension. For example, Martin suggests that some knowledge related to organization and information is necessary.

> The content inventory and auditing process assumes two things: first, that you have content to index, and second, that you have someone on staff with an affinity for organization and information (Martin 2012).

For *Content Insight*, showing some interest in content and its management seems sufficient.

> Who performs content audits? Anyone with a stake in how content is created, organized, and displayed can conduct a content audit ("Website Content Audits").

Others, like Nichols and Chesnut, clearly indicate that no particular expertise is needed:

> But you do not need to be an expert to complete the audit exercise (2014).

It seems highly likely that the level of complexity of the selected criteria will affect the auditor's required level of expertise. Indeed, some audit criteria require a higher level of expertise than others or require specific knowledge. It may also be that the size of the information ecosystem will affect the level of expertise required. For example, conducting a content audit on the entire information ecosystem of a university or government entity with thousands or even millions of units of heterogeneous content will likely require a greater expertise than carrying out the content audit of a small business website with a few dozen pages.

Internal or External Auditors

ISO 19011 (2011) divides audits into two categories: internal audit (first-party audit) and external audit (second- and third-party audit). The former is carried out by or for the organization, and the latter is carried out by or for parties related to the organization, such as clients and partners (second-party audit), or by independent audit bodies, such as regulators or certification-granting organizations (third-party audit).

In our corpus, audits seem to be only first-party audits (internal audits), and this dimension is addressed by only a few authors (13 publications, 6.4 percent of the publications) (see Table 1).

Table 1. Auditor within or external to the organization

Auditor within an organization (by the organization)	Auditor external to the organization (for the organization)
8 publications (4 percent of the publications)	8 publications (4 percent of the publications)

We observed that eight publications suggest that the auditor should be within the organization (by the organization) and that the same number of publications suggests calling on a consultant auditor (for the organization). The type of audit, its complexity, or the necessity to understand the content could determine whether an internal or an external auditor is required.

Alone, or as a Team

Finally, we wanted to identify the number of auditors suggested for conducting a content audit. Some authors throughout the corpus suggest carrying out the audit alone, and others advise employing more than one auditor, thus to constitute an audit team.

We noted that in 11 publications of the corpus (5.5 percent of the publications), it is suggested that an auditor should conduct the audit alone, and in 27 publications, the auditor should set up an audit team (13.5 percent of the publications). Mainly, it seems to depend on the complexity of the audit and the amount of content to audit.

Personal Characteristics of an Auditor

Throughout the corpus, the personal characteristics of the content auditor are mentioned only twice. Leibtag says that auditors need "an incredible amount of patience and curiosity" (2013). Spencer also argues that conducting the method "require[s] patience, persistence, curiosity, and attention to detail" (2014). Patience and curiosity seem the two most important personality traits for a content auditor. However, more research is needed to address this aspect more exhaustively.

Conclusion

Although an auditor's professional skills are discussed in our corpus of 200 publications, the topic is rarely addressed in-depth. Also, our results highlight a significant disparity between authors. IA professionals and content strategists seem to be the main specialists involved in the content audit process, but many other fields of expertise are also mentioned. The data also suggested that there is no real consensus on other important aspects regarding the auditor, such as the necessary level of expertise, the number of auditors, and whether the auditor should be internal or external to the organization.

This study not only informs the wider body of knowledge about content audits but could also support organizations in forming an auditing team or selecting individual auditors. Furthermore, results of this study could foster an evolution of content audit practices or at least encourage reflection on practices, particularly with regard to auditors' required expertise. The disparity in authors' discourse and the lack of in-depth reflection on the topic found in our results seems to call for more research on the skills needed to carry out a content audit, in order to ensure the quality and the credibility of audit outcomes. i

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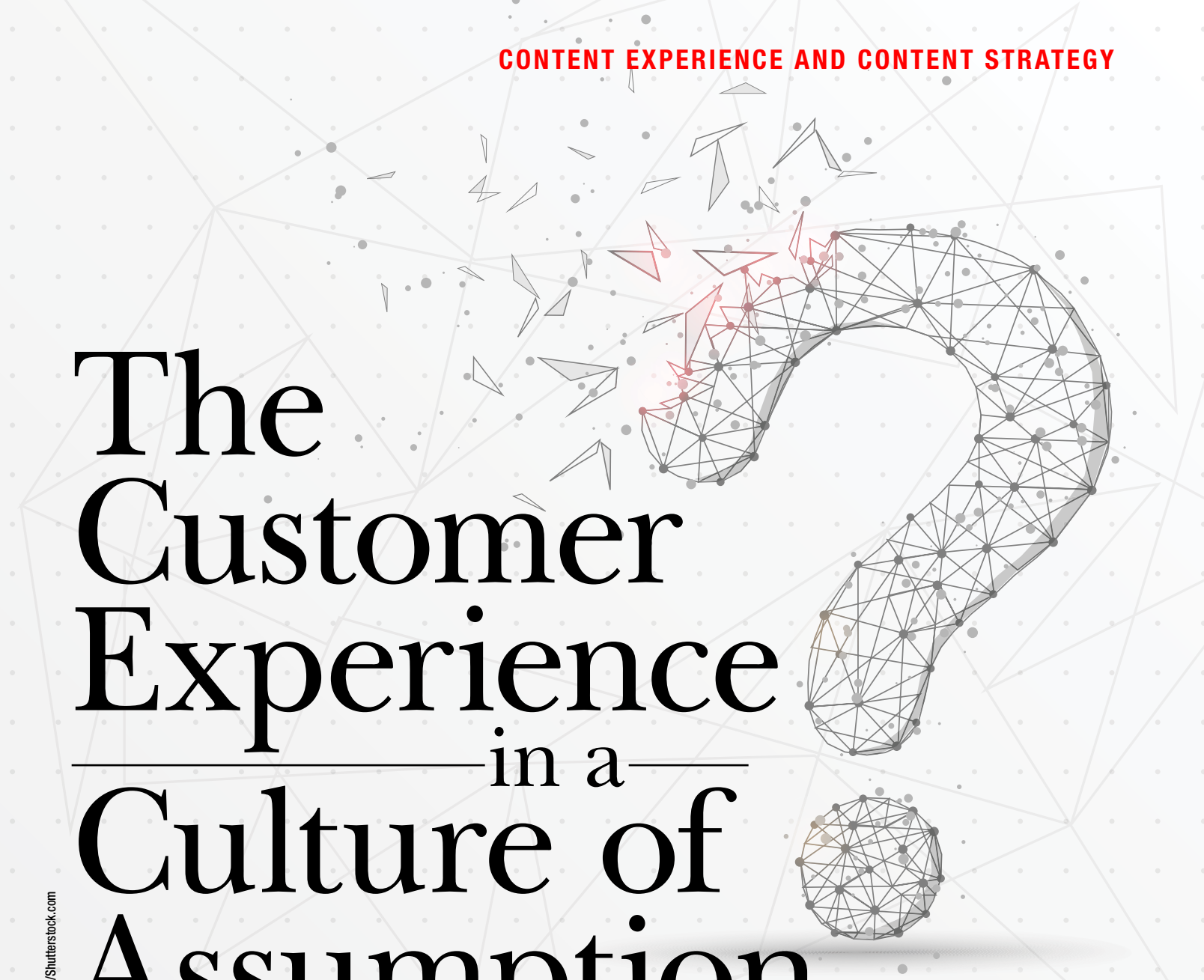

The Customer Experience in a Culture of Assumption

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By ALAN J. PORTER | *STC Senior Member*

A MAN WALKS into an English Pub wanting to order lunch…

It may sound like the beginning of a joke, but on a recent trip to the United Kingdom it proved to be a good lesson in delivering customer experience. Let me explain. In an online exchange a while back, a friend of mine used the expression "a culture of assumption" when describing her frustrations at dealing with various levels of bureaucracy after relocating to another country. People just assumed that she knew which forms to fill in, or which agencies to contact. I can totally sympathize with that having gone through similar experiences when we relocated from the United Kingdom to the United States a couple of decades ago.

When we recently flew back to the United Kingdom for a family wedding, I noticed several examples of that "culture of assumption" on display—the unwritten, and probably unacknowledged, concept that your customers just know how things are meant to work when dealing with your processes. From hotels, to paying for parking, to buying gas, to airline check-in procedures, there was an unstated expectation that we would just know where elevators were, where pay & display machines were located and how they worked, how to pay for gas at a pump that didn't have a credit card reader, or which check-in line to stand in and where to drop off our bags.

Back to the pub…

At various times during the trip we, went out for a pub lunch with various family members, all at different pubs. In each one we wanted drinks and a meal. After walking into the pub, we then had to figure out what to do next—and in each pub it was different.

Pub #1: Find a table, note the table number, order drinks and food at the bar, open a tab on your credit card. Food is brought to the table. Return to the bar at the end of the meal to pay.

Pub #2: Order drinks and food at the bar. Pre-pay. Get a number. Find a table. When the food is ready, it's taken to the bar. You pick it up when your number is called.

Pub #3: Order drinks at the bar. Let them know you are eating. Get escorted to a table in the "dining room." A waitress takes your order and delivers the food. Return to the bar to pay at the end of your meal.

Three pubs, three different processes, three different experiences. All of them were good meals, and I wouldn't want the pub experience to become a homogeneous standard, as it's the differences that make the pub experience richer than the chain restaurant (especially in the United Kingdom), *but* none of the three pubs had anything posted to let you know how their individual lunch process worked. All it would take is a sign on or near the bar with a few steps explained.

The inconsistency in ordering pub meals doesn't seem like a big thing, but it got me thinking.

The more I've thought about it, the more I've noticed that assumptions run through any organization and impact the way we interact with customers. You would think that, being professional communicators, we are better than most at keeping the customer in mind and explaining how things work. On the whole we are, but unfortunately, as I've seen in various recent examples, technical communication isn't immune to the "culture of assumption." I had a recent discussion with a fellow technical communicator about why something that was primarily intended for a technical audience might end up in a senior executive's hand, and thus should include simple, one-line explanations of XML and DITA and how they applied to the problem under discussion. Ever read a manual for a piece of equipment you're using for the first time and wondered "what do they mean by that?"

Why We Make Assumptions When Communicating

We all make assumptions when we communicate. It's natural, and it's a hard habit to break, but the more we are aware of it, the more we can control it and the impact it has on our customers. In my experience, there are four main reasons that we make assumptions.

We bring them with us. We are informed by our life experiences, the work we've done, the TV and movies we watch, the books we read, the schools we attended, and the conversations we have with friends and colleagues. Throughout all of that, we develop verbal shorthand and common frames of reference that those who shared a portion of our experiences will also understand. We don't want our customers to be like Captain America, declaring in a surprised voice, "I understood that reference."

It depends where in the organization we work. I'm sure we've all worked at organizations that have their own internal language (some so extensive that they develop internal glossaries). This is often subdivided into other specific terminology that relates to a function of the company or a profession. A marketer speaks a different language than a lawyer or an accountant. Often companies will have different definitions for common industry terms. For instance, I worked at an aerospace company and a construction equipment manufacturer, each of whom had very different ideas of what a "parts list" was and what information it should contain.

It depends what technology we use. We live in a technology-driven world, but that doesn't mean that we all have the same level of experience, comfort, or expertise with technology. I remember back in the late 1990s being shocked that when I started to deliver a training class for a content management system (CMS), I had to teach several class participants how to use a mouse.

It depends where we live. Perhaps the biggest influence on the underlying assumptions we make is cultural influences, just like the ones that I described at the beginning of this article. Everyday life exerts a massive influence on the way we communicate. For those of us living and working in North America, it's natural that we take a U.S.-centric view of the world—one that we consider to be digitally connected. But if you are communicating with customers, or potential customers, across the globe, this is a misconception that can result in barriers to doing business. In any business, we need to know who our customers are, and not just what they want from a business perspective, but what culture they experience. Certain images, colors, symbols, and words convey very different meanings in different cultures.

But what about the old writer's guideline of "write for the audience." That contains a certain amount of assumption, yes? Yes, it does, up to a point. As I mentioned above, not everyone in your audience has the same level of experience. You need to find the "lowest common denominator" within your audience. Explain things that may seem obvious to you, those who need the guidance will thank you, and the experts can skip over it.

A few years ago, I was involved in the development of a proof of concept for an augmented reality (AR) application for maintaining a piece of equipment. As part of the project, we ported over the existing technical documentation for that particular piece of equipment and discovered that due to the assumptions made in the document, such as where particular maintenance panels were located, there were a lot of gaps that needed to be filled to deliver a continuous, step-by-step AR experience. It may seem unnecessary to most people, but I've worked on equipment manuals where we had to include instructions about how to use a screwdriver, because we knew that some of the audience would be entry-level folks who had never touched a tool box before.

Also consider that in today's digital and connected environment, you can't control the customer journey. We can no longer control how, when, and in what sequence our customers might encounter and interact with our content. It's a good rule of thumb that every page is page one. We can't guarantee that someone is going to start at the beginning of our nicely worded manual or help topic and read all of the introductory information and definitions before they get to the piece they need. Chances are, they came to your material from a search query, not a table of contents. The order of engagement that you carefully planned is no longer valid.

The Customer Doesn't Care Where Your Content Comes From

Your customers shouldn't need to know which business unit produces a particular product to be able to get information about it. They shouldn't need to care about which department is the correct contact to complete a form or to pay a bill. They shouldn't need to know the intricacies of how account numbers are put together or have to guess at the password-formatting restrictions your IT department has put in place.

Customers just want answers or help to complete a task. It amazes me how many companies make it difficult for me to give them money, because they have designed the customer experience around how their internal processes operate and make the assumption that I would somehow know that.

Research by the *Search Engine Journal* in early 2018 revealed that the top seven content types that customers look for are:

1. Answers to the 5Ws (what, why, when, where, who)
2. How-to or instructional material
3. Definitions (especially of complex terms)
4. Comparisons
5. Price or cost breakdown information
6. "Best" lists
7. Updated content

The Experience Customers Expect

We are all someone's customer. Think about the customer experiences that you like; the ones that make it easy to do business, complete a task, or get the answer to a question, because the company doesn't make any assumptions about what you know. We all like things to just work and help us with a minimum of fuss, and we don't want to spend time figuring out how things work before we use them. We also don't want to have to understand someone else's process to do be able to do something. We should bring our own experiences and expectations to the way we communicate to others.

> [A]ssumptions run through any organization and impact the way we interact with customers.

Test for Underlying Assumptions

If we want to make a real effort to remove the culture of assumption from the way we communicate, we should test out our work and communication with the "let Bob read it first" test. Have someone who has no interaction with the subject or process you are covering in your content to read it or try to perform the action you're describing (ensure you are not breaking any company confidentiality rules, of course). If you can't test with subjects outside of your organization, then get someone from another department or functional area to do a review. If you are a global organization and are developing something for another part of the world, have someone who is living in that culture check it out. Find your "Bob," and let them uncover your assumptions.

The best advice I can offer is to be aware that the culture of assumption exists and that we are all guilty of it. Try to be aware of it, look for examples of it in the way you interact with other organizations and in everyday life, then think about how those experiences can help make the way you communicate better. Try asking yourself these three questions:

- How easy is it for your customers to interact with your company or brand?
- Do they have to know the way you work to achieve what they want, or do you make it easier with a guided customer experience?
- Do you assume that just because you know how to do something, that your customers (or even other employees) will?

And let the answers guide you to improving your content by making explicit your underlying assumptions.

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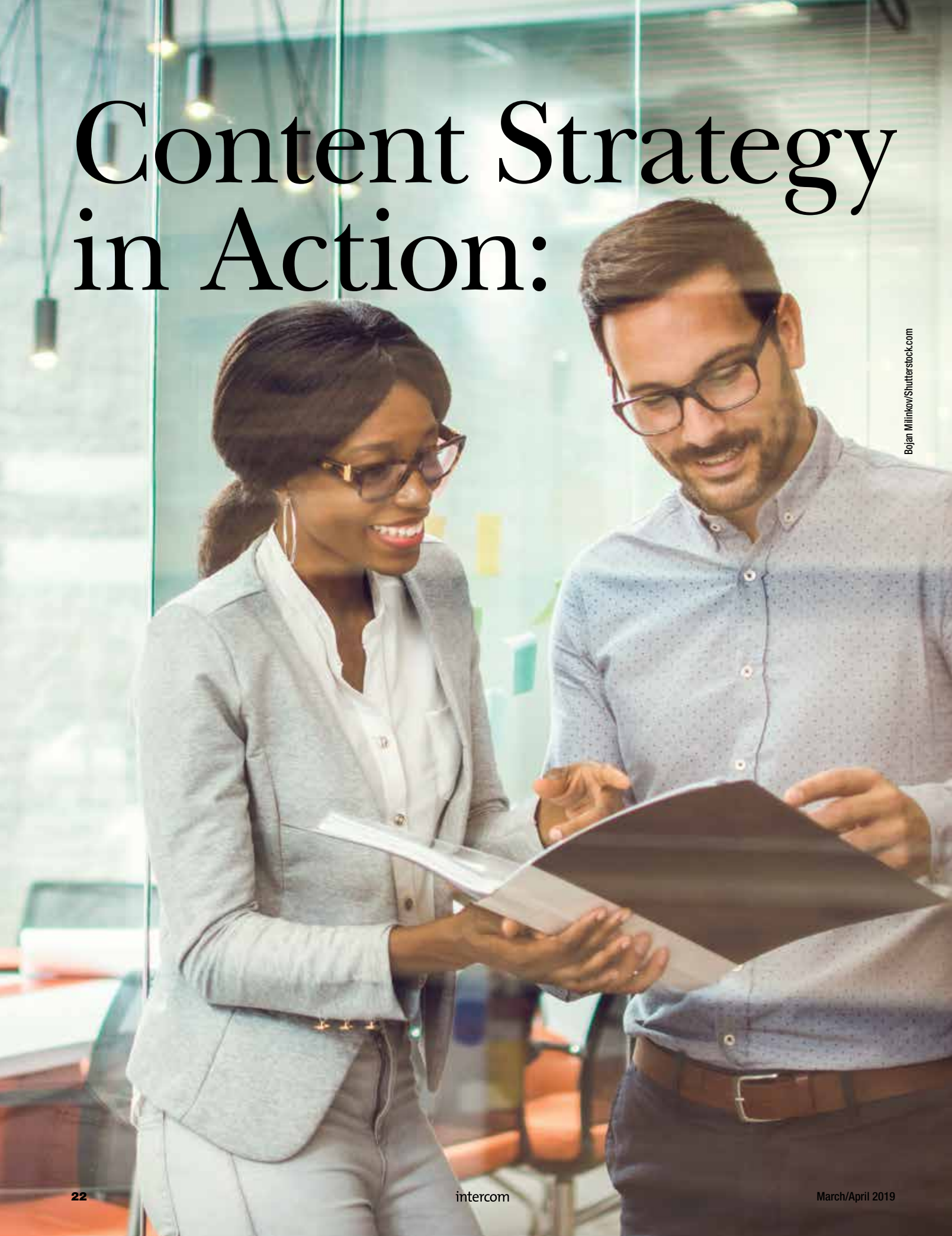
Content Strategy in Action:



Bojan Milinkov/Shutterstock.com

Enabling Sales with Product Documentation

By RICHARD RABIL, JR.

IN ALL OF THE DISCUSSIONS that have occurred over the years about content strategy and the value of technical writers in the workplace, one theme that frequently emerges is how technical writers can apply their writing and organization skills to enable sales.

For example, in 1995, Janice Redish published an article in *Technical Communication* listing "more sales" and "more proposals won" as two ways that technical writers can show their worth to organizations. More recently, in 2017, Emily January Petersen wrote about how technical writers should claim credit when their documentation is referenced by sales teams and managers to answer questions. And at the STC Summit in May 2018, Bernard Aschwanden delivered a talk about how it is becoming more common for marketing and technical communication teams to integrate their deliverables in order to bolster sales and customer satisfaction.

In each of these examples, two core questions are raised about the value of technical writers:

- How exactly can the content that technical writers produce enable sales?
- What are some deliberate content strategies technical writers can employ to achieve such enablement?

How Documentation Can Enable Sales

Most companies that sell software (or any kind of complex technology product) face a basic challenge: to sell what a product actually does, while resisting the urge to exaggerate or over-promise in order to win a major deal.

Indeed, discrepancies between what is promised in a sales pitch and how a product really works can result in serious friction in a client relationship and possibly undermine future deals. Such disconnects can also lead to steep expenses if the company must repair broken trust or devote precious resources to building custom solutions to compensate for a product's limitations—situations that might have been avoided by more clearly documenting the product in the first place.

I witnessed the consequences of such disconnects in my own workplace several times. Product managers would come to the technical writers and say, "The sales team is selling product capabilities that we do not have or that are not fully mature, and they send us the same questions over and over again about what the product can and cannot do. Can you help us better educate them on the product's features, requirements, and limitations?"

As we investigated this issue, we found that there were in fact many internal audiences who could benefit from a centralized, approved documentation resource that could answer questions stemming from the sales process. Specifically, we learned that we could better equip the following internal audiences:

- **Sales Operations Analysts**: Individuals who work with sales teams to proactively identify opportunities, research competitors, and train new hires. These individuals must regularly verify their understanding of the product as they assess product-to-market fit.
- **Solutions Architects**: Individuals who must assess how the product can meet a client's unique technical requirements, and who must therefore know the product's capabilities, shortcomings, and configuration options.
- **Proposal Writers**: Individuals who must write detailed, sales-oriented descriptions of the product's capabilities and who must verify that their descriptions are valid and up to date.
- **Sales and Marketing**: Individuals not only deliver regular sales pitches, but who study industry trends and look ahead to decide how best to promote the product's unique value.

Of course, not every organization has this many distinct roles dedicated to generating revenue. In small organizations, a single person may fill multiple sales roles, and the technical writer may wear the hat of the proposal writer. Whatever the case, as technical writers we are well-positioned to support these audiences, because we are usually much closer than they are to the inner workings of the product. We are also trained to research, create, and deliver content in a way that internal audiences can quickly find and understand.

To unpack this observation, let's examine how technical writers can leverage their skills to enable sales in the following key areas:

- Research and collaboration
- Writing and design
- Ongoing maintenance

In the interest of space, I will focus on how technical writers can create *internal* documentation to support *internal* audiences involved in the sales process. Consumer-facing technical writing artifacts (such as user guides and video tutorials) can also support sales by piquing customers' interest and strengthening existing customer relationships. Bernard Aschwanden's presentation (referenced above) offers some useful ideas on the subject. For another good resource, I recommend "Strategic Marcomm and Techcomm Integration," a white paper published by Adobe.

Enabling Sales through Research and Collaboration

How can technical writers apply their research and collaboration skills to help sales teams sell a product with boldness and confidence? There are many answers, but one strategy we used at my company was to begin by creating a *knowledge map*: an annotated matrix that my team built as a spreadsheet after speaking to various teams about their information priorities (see Figure 1).

On the left axis of the matrix, we listed categories of information that we thought each team needed. Along the top axis, we added a column for each team. We then scheduled a series of meetings with team representatives and gave them a chance to rank each category and to add custom categories we hadn't included. You can learn more about the process we followed in an online video presentation by Rebecca Glassman Sheridan called "Cultivating Content: Designing Wiki Solutions That Scale."

As a result of the knowledge mapping exercise, we verified categories of knowledge that we already knew teams across the company needed, such as feature descriptions, demos, and release notes. Additionally, we uncovered categories that were representative of the kinds of questions that clients would ask during the sales process. Naturally, these categories will vary depending on your industry, product, and so on.

- **Requirements**: What does the client need to have or do for the product to work successfully? In our case, the requirements included certain types of historical energy data from utilities.
- **Limitations**: What can the product *not* do? Are there any common misconceptions or known issues for sales teams to be aware of? As an example, we needed to explain why the Web version of a feature might display different data than the printed version.

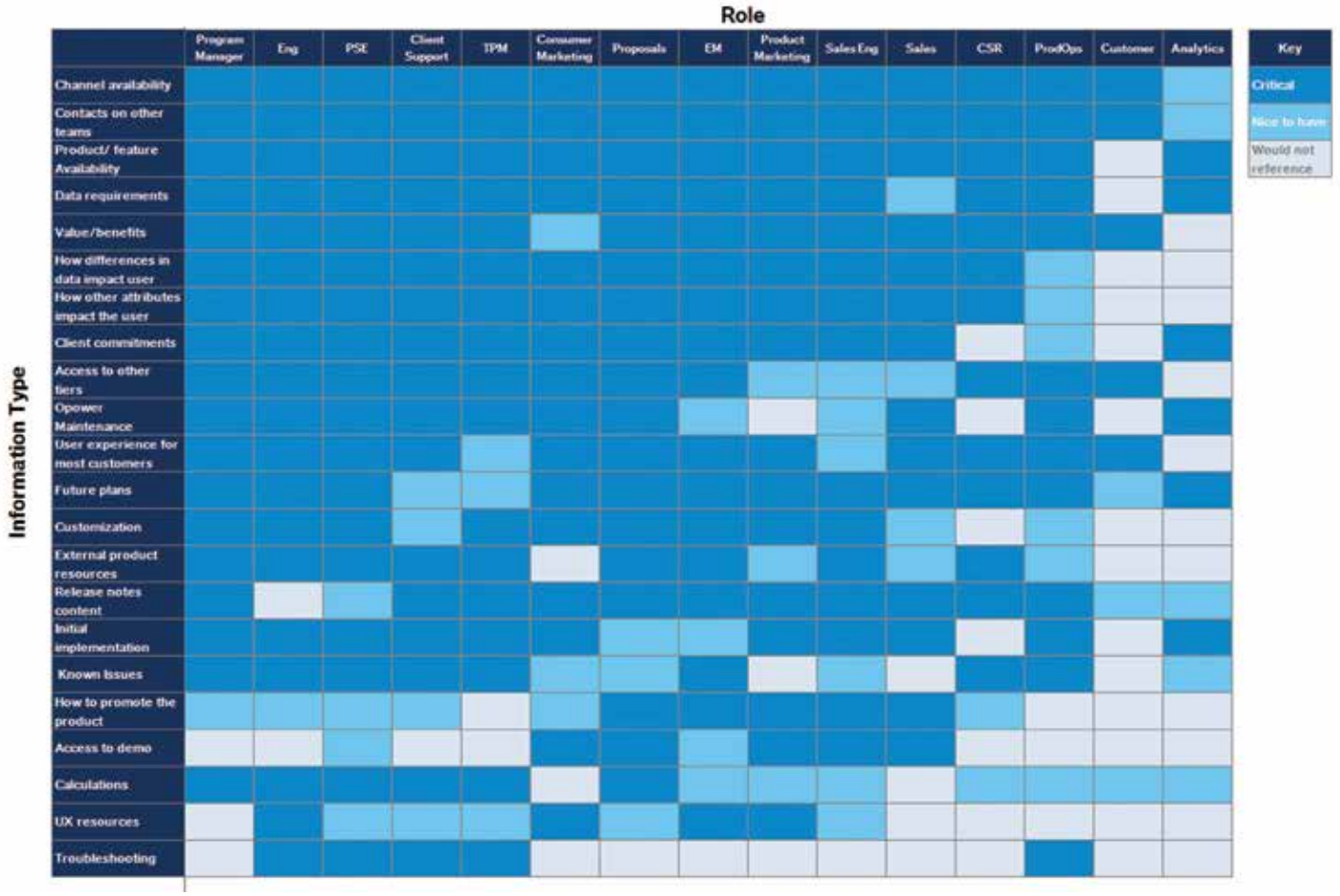


Figure 1. A knowledge map our team created after asking other teams which categories of information were most important to them.

- **Configuration**: What product- and feature-level configurations are available to clients, if any? If my desired configuration is not available, can I request a special customization?
- **Design Rationale**: Why did we design the product or feature as it is currently designed, and why did we choose that design instead of alternative options? Do we have data to show why our design is the best option?

By capturing and ranking these categories, we could identify what information was already in our consumer-facing documentation and what was lacking. We also had the foundation we needed to design the metadata and structure for an internal product knowledge base.

Enabling Sales through Writing and Organization

Once you identify the core information needs of sales teams, you can decide if your existing documentation can meet those needs or if a new resource is required. In our case, we realized that although our internal and consumer-facing documents already covered some of the information, we would have to develop a new internal resource to meet a wider array of requirements. And we would need to write and deliver this resource in a way that would be easy to find, use, and maintain.

There are several ways to do this, and the choice you make will be constrained by resource availability, technology, and the like. We decided to create a central, authoritative knowledge base in our corporate wiki. This worked very well for us, because there was already a robust collaborative wiki in use by teams across the company. Our wiki also had certain desirable features, such as commenting sections, search engines, version control, and simultaneous editing.

Of course, embarking on the effort to design and write a knowledge base, whether it resides within an existing corporate wiki or elsewhere, assumes that you have the time to do it—time in addition to the work you already do as a technical writer. You may need to make a business case to hire an additional writer. Our team was fortunate enough to have business leaders who saw the value that our knowledge base would provide to sales teams, and they approved our request for another resource.

Whether a new resource is needed or a shift in one's every-day priorities, the next step is for technical writers to do what they do so well: Design a structure based on the target audience's needs. For example, below is the standard high-level structure of a product guide in our knowledge base that incorporated our research.

- Overview
- Global Requirements and Limitations
- Customer Experience
  - Feature 1
  - Feature 2
  - Feature 3
  - Feature n
- Demos and Internal Access
- Customer Support
- Configuration
- Calculations

For each major topic in this outline, we designed a standard structure and template. For example, if a user viewed a feature description, they would find a consistent breakdown of metadata and subsections in which knowledge is organized around the following categories:

- Feature Name
- Overview
- Requirements
- Limitations
- User Experience
  - Sub-element 1
  - Sub-element 2
  - Sub-element 3
  - Sub-element *n*
- Common Variations
- Configurations
- Calculations

Figure 2 shows a sample of how this outline translated into an actual wiki page. There are a few important notes

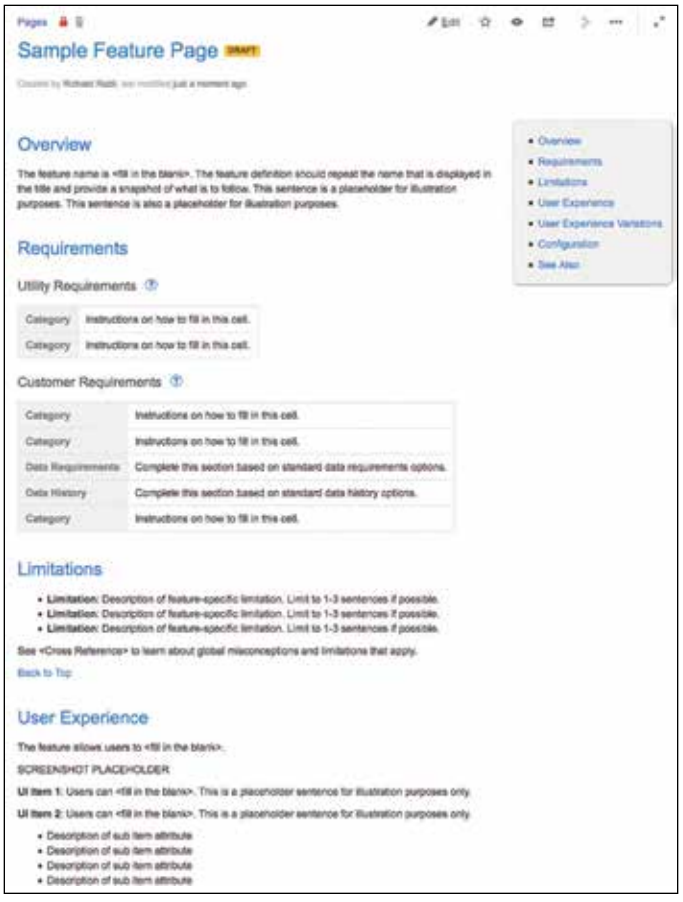


Figure 2. A sample feature page designed to support various internal audiences at our company, including sales.

to highlight here. First, to keep the content as consistent as possible across contributors, we applied best practices in content strategy to define patterns and rules for what kind of information to write and how to present it. This was essential for achieving a unified voice and level of quality.

Second, we designed our internal resource to act more like a conceptual reference than a task-based manual. This is because we needed to arm sales and other internal teams with answers to questions about the full range of product capabilities, not to help them accomplish specific user tasks.

Third, by designing research-based standard categories of knowing and putting them in a central location, we developed an authoritative brand that was distinct from the rest of the wiki. This brand assured users that the knowledge they were viewing was reliable. Prior to the knowledge base, product information was scattered across different wiki spaces and systems of record and was highly variable in quality, leading people to doubt its veracity—a problem that resulted in a lot of emails to product managers and engineers. Having a centralized, high-quality knowledge base went a long way toward mitigating that issue.

Enabling Sales through Ongoing Maintenance

As every technical writer is aware, technology—and especially software—is subject to change, and the documentation you write must keep pace with those changes. In the context of sales enablement, sales teams need to be sure that the product knowledge they have is accurate and up-to-date.

Technical writers have many tools in their toolbox to provide such assurance. In addition to the standard content maintenance practices (such attending product planning sessions, updating content to reflect new features, and soliciting end-user feedback), our team employed one other strategy that became an essential element in enabling sales: setting up a channel for asking ad-hoc product questions.

The channel, which we dubbed "Ask Product," started off as a ticketing system where users could submit a ticket with a question whose answer could not be found in the knowledge base. Members of our team would then act like librarians, either finding an answer or connecting the reporter of the ticket with the right subject matter expert. The system has worked well over the years, since sales teams often encounter unique client scenarios that the standardized documentation set might not address.

Conclusion

By researching the needs of sales teams and providing them with reliable product knowledge and answers to ad-hoc questions, technical writers can add deep business value to their organizations. Indeed, we experienced firsthand how a sales-friendly knowledge base fits well with research conducted by Michael Hughes (see Resources) about how technical writers do not simply *transfer* but *create* knowledge for consumption by users with varying information needs. We have also seen how this approach allows technical writers to facilitate knowledge flow across the organization, as discussed by Tom Johnson in a series of essays on his blog about a technical writer's value.

Last but not least, supporting marketing and sales teams demands that technical writers leverage their core competency in simplifying complexity—another major theme discussed in Tom Johnson's essay series (see Resources). It is not enough to create a searchable, user-friendly wiki; the content itself must be clear enough to answer a range of questions from across the organization. In that sense, simplifying complexity will always remain one of the most useful ways that technical writers can enable sales in the workplace.

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Announcing the Results of the 2019 STC Election

STC, THE NOMINATING COMMITTEE, and the Board of Directors are pleased to announce the results of the 2019 STC election.

When voting concluded, of 2,482 eligible voters, 402 (16.20%) cast ballots. There were some abstentions in each of the categories.

Congratulations to those elected, and great appreciation is extended to all candidates for their dedication to STC and willingness to devote their time and energy to improving our Society by running for office. According to STC's Bylaws, the results become official when they are announced at the Annual Business Meeting at the STC Technical Communication Summit & Expo in Denver, Colorado, on Monday, 6 May 2019.

President

Ben Woelk (automatically succeeds from Vice President)

Vice President	Votes
Craig Baehr*	238
Alan Porter	161

Treasurer

James Bousquet*	396

Director (two positions)

Laura Palmer*	282
Bethany Aguad*	253
Kirk St.Amant	221

Nominating Committee (two positions)

Kelly Schrank*	227
Li-At Rathbun*	220
Jack Molisani	181
Sara Feldman	158

**elected*

Introducing STC Roundtable

PARTICIPATE IN STC Roundtable for free this month! April's theme is "content strategy and experience" curated by Rahel Anne Bailie. If you've never participated in STC Roundtable, you simply need to sign up for free by visiting *https://www.stc.org/roundtable/* and clicking "Sign up for Roundtable."

In April's first free webinar, Rahel Bailie looks at the progression of content strategy, particularly how it applies in the technical communication world, and why it's important to develop a content strategy to inform your technical communication processes. Not only does a content strategy help with an operational model for content, it also helps bridge silos between tech comm and other groups, such as development and marketing. You can view the recording, as well as subsequent April content, at *https://www.stc.org/roundtable/content-strategy-experience/.*

In case you missed it

Week 4 of the March STC Roundtable included a video in which practitioners across industries and geographic areas discuss the skills they think technical communicators need to stay relevant in the tech comm world going forward. Watch the video at *https://www.stc.org/roundtable/future-of-tech-comm/* and see what they have to say.

Looking ahead

The gap analysis is a standard tool for analyzing performance issues, but doing a gap analysis as part of a content strategy requires more than the average set of questions. In the next April webinar, learn about Rahel Bailie's five-pillars approach, with a handy toolkit that you can put to use in your own workplace.

The trial months are open to everyone. Check out the great new content, interact with our experts, and contribute to the conversation.

Social Media Recruitment within Technical Communication Programs

BY DANIELLE MCDOUGAL | *Guest Columnist*

Social Media and Recruitment

We are in the golden age of social media, and many colleges understand that social media is an effective tool to recruit students into their programs. Technical communication departments can emulate this tactic as well, but social media can be intimidating. Where would a technical communication program start in adopting a social media strategy for recruitment?

This article provides a guide through the different social media sites to choose from, explains how to use social media effectively, and offers additional advice about how to get the most out of a social media plan. Social media can be used to recruit students, but programs need a plan and an understanding of social media to use it properly as a recruitment tool.

The Student Perspectives column provides insights, experiences, research, and more from students across technical communication. We're proud to introduce new voices, inject new ideas, and give the practitioners of tomorrow a platform to begin publishing their thought leadership today! Columnist Ryan Weber teaches technical communication at the University of Alabama in Huntsville and hosts the podcast 10-Minute Tech Comm. Contact him at *rw0019@uah.edu* to submit or pitch a column idea.

Social Media Sites

There are a wide variety of social media platforms to choose from when trying to reach potential students. Facebook and Twitter remain two of the most popular social media platforms in use today, but LinkedIn and YouTube are still popular social media sites to consider using. There are newer platforms, such as Instagram and Snapchat, that may also work for student recruiting.

While there are many to choose from, I don't recommend using all of them to start, because that requires a lot of time and effort, and they might not all work for the audience you are targeting. It is up to the recruiting department to determine how many social media platforms it can handle. Properly maintaining even one social media platform is better than using three inconsistently.

A department should decide which social media platforms to use by conducting an internal analysis to determine the goals of social media before pursuing one platform over another. Does your department feel they need to increase their brand name? If yes, then using Facebook is the most appropriate, since it has the largest audience. Does your department want to cater specifically to a younger audience? If yes, then consider using Instagram or Snapchat, as younger audiences are more drawn to those platforms. Choosing a social media platform can be a daunting task, but understanding your audience, department needs, and the strengths and capabilities of each social media platform will make the decision easier.

Using Social Media Effectively

Social media should encourage discussion and information sharing (Reuben 2008). Because of this, content should start a conversation with potential students, engaging them to ask questions and to be honest with their opinions. If a student is responding to posts, then there is a good chance that the individual is interested in the program. Most social media platforms have analytical

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tools built into their systems, which help measure success. Use these tools to determine which posts are the most effective, when posts or pages get the most engagement, and other important information to improve reach in future posts.

When posting on social media, departments need to make sure that the content is authentic, relevant, and current (West 2016). Use more photos and videos instead of relying on posts with a lot of text. West also notes that social media is not the sole or even primary tool used in recruiting. Social media improves a strong marketing strategy; it is not the forefront of your marketing. To be effective, you need a plan to implement a social media recruiting strategy to ensure that posts are cohesive in tone and style and properly represent the technical communication program.

Understanding your audience is an important part of knowing exactly what to post to recruit students. Martin discovered that students generally expressed interest in forming friendships and finding possible roommates, taking part in campus activities and events, sharing interests, and being open with their positive and negative emotions about the college enrollment process (2015). Students want to be involved, and you can use that lens to generate post ideas to engage students into the technical communication department.

Giordani (2013) recommends several tips for recruiting with social media, such as finding areas of strengths and weaknesses of different social media platforms, staying flexible and adapting to newer platforms if necessary, observing sensitivity with posts, and always conducting research on what's new and trending to reach the target audience.

The posts, no matter the social media platform, need to be pertinent to the field of technical communication or the technical communication department, and they need to gain the interest of possible students. Some examples of possible post ideas include:

- Department news (such as new courses or technical communication information sessions)
- Faculty publications
- Student highlights
- Information on current technical communication courses the department offers
- Links to articles about what you can do with a technical communication degree or certificate, developments in the field, etc.

Additional Notes About Using Social Media

There are many suggestions for effectively using social media platforms for recruiting, but there are also many notes of caution.

Barnes and Lescault (2013) highly recommend having a set of policies in place for how recruiters should behave when posting or responding to posts on social media. Coles (2014) says that bad comments on a social media post can be just as important as the good comments, because this allows you to showcase your professionalism to the public. If someone posts a negative post, respond to this post with professionalism and accuracy, if the department deems it necessary. The department's reputation is reflected in social media posts, so maintain professionalism at all times, whether post engagements are negative or positive.

Do not use social media platforms that you do not know how to use properly. If the department uses social media platforms it is familiar with, knows how to navigate, and knows how to effectively post to, it will save time and effort.

Ensure that your marketing and branding efforts align so that potential students do not become confused about the department's identity and where it aligns with the rest of the university. Consistency is also important to enable the department to exist as a more cohesive unit outside of the realm of social media. Keep the language and formality of your posts consistent, so students know what to expect when you post.

Conclusion

For technical communication departments to recruit students using social media, they need to:

- Decide which platform(s) to use
- Decide what to post on a consistent basis
- Create a policy about how to post to the department's social media
- Determine who will have the responsibility for posting and managing posts
- Decide how to best use posts to gain the most post engagement with possible students

After these points are addressed, create an editorial calendar to help keep posts organized and save time. By coming up with several post ideas at once rather than every time the department posts, you will save time and resources. It is typical for a social media page to have no less than three to five posts a week, with more active pages typically having more post engagement from possible students. There is no set formula for successful posts, but they typically use multimedia elements and do not include a lot of text.

A social media plan needs to be flexible to adapt to new events or information that a department may want to share. No plan will be perfect from the beginning, but if your technical communication department stays with your plan and modifies it as needed, you might see a rise in enrollment numbers and an increased interest in your program. i

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Mental Models, Feedback Expectations, and Usable Designs

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BY KIRK ST.AMANT | *STC Fellow*

HUMANS ARE WIRED for feedback. We use feedback to assess our communiques, and we provide feedback to let others know how we feel. Sometimes, we are aware of this factor; other times, things happen reflexively. In all cases, humans need feedback to determine whether something worked. Understanding how these feedback dynamics operate can greatly enhance usability and design.

Mental Models and Interaction

When humans interact, we often create mental models of how we might present information and how audiences might respond. Usually, we create a series of mental models for presentation and response and compare them to determine which approach would work best. We then use the "best" approach and wait to see how our audience reacts—or what feedback they provide in response.

We use this feedback to determine how our message was received. If feedback indicates all was successful, we move on to our next item. If feedback indicates an audience did not understand, we use that information to revise our mental model, try again, and wait for a response. We continue with this process of "revise mental model, try again, and wait for new feedback" until we achieve success or give up. Social psychologists refer to this iterative process of mental modeling based on feedback as *minding*, and it has implications for usability and design.

Minding and Use

Minding often guides how we use objects. When we see a screwdriver, our mind accesses a mental model of how we think it should be used. We rely on that model to:

- Guide how to use the screwdriver
- Assess the results of our actions (feedback) to determine if we're using it correctly

For new objects, we create several different mental models for use, select the one we consider most accurate, and try to use the object. We rely on feedback (i.e., the results of our actions) to determine if we need to revise our mental model of use and try different approaches, as needed.

The more interactive the item, the more essential feedback is to effective use. To use an app on a mobile phone, we review the icons displayed and create mental models for how to use a given icon to perform a task (e.g., accessing the feature for calling someone). We select the "best" model, perform the related action (tap a "phone" icon), and wait for feedback. If we encounter expected feedback (e.g., a keypad for dialing numbers appears), then we know the process worked. If, however, we do not encounter expected feedback (e.g., a "Not recognized" message appears), we use that result to revise the mental model of use and try again.

Interaction, Feedback, and Design Expectations

The more interactive the item, the more kinds of feedback are expected at different points in a process. Logging in to an email system, for example, might require users to move through several screens. At each step, the user expects feedback to indicate if a task was performed correctly or not. The result is a feedback chain—a series of different kinds of feedback that users expect to encounter when using an interactive technology. The more steps or interactions in the

This column examines how cognitive factors can affect technical communication and design processes. Email the editor at *stamantk@ecu.edu*.

process, the greater the number of links—or indicators of activity—that users expect to encounter in the chain.

Feedback is central to these processes, for humans expect some sort of signal to know how to proceed with an interaction. For this reason, designs need to include feedback cues that lets the user know:

- If an activity has been recognized as performed (something has been done)
- If so, was that activity the correct one or not (something was done correctly)
- What to do next (if done correctly) or do differently (if done incorrectly)

Achieving these objectives involves addressing five aspects of the minding-feedback relationship.

The Five Factors of Minding

Effective feedback cues address five factors related to minding expectations:

Factor 1: Need. Individuals need feedback cues to indicate their actions were recognized after they complete an action (e.g., clicking on an app causes a change in the interface).

Factor 2: Speed. Feedback cues need to be *seen* to be useful; cues that are too quick to register (e.g., a split-second flash of red) do not let users know if a process was done correctly or not. Rather, cues need to occur long enough to catch the user's attention and persist until the user responds to them (e.g, a light that blinks until the user performs a specific action).

Factor 3: Heed. Feedback cues must catch and hold a user's attention (be heeded) to be effective. Feedback cues that are too subtle can be overlooked—or easily forgotten if one is distracted—and fail to provide the information needed to facilitate use.

Factor 4: Read. For feedback cues to be useful, individuals need to recognize the message that they convey. Cues that gain the individual's attention, but don't clearly indicate if something was done correctly, cause confusion. Those that clearly note such factors facilitate use.

Factor 5: Proceed. Feedback cues need to indicate both that something has been done *and* what needs to be done next or in response. For processes performed successfully, cues should indicate the next thing users need to do (e.g., "Enter Password Now"). For processes done incorrectly, such cues should note what went wrong or what needs to be done to address a situation (e.g., "Complete fields marked with *").

Designs that address these factors provide the feedback needed to perform actions successfully and use items effectively.

Final Thoughts

Usability is about meeting expectations. Such expectations are formed in the minds of users and guide how they interact with objects. By understanding the role of feedback in such situations, technical communicators can create designs that effectively guide human uses of different tools and technologies. The five factors of minding can help with such processes and can contribute to creating more usable designs.

PRACTITIONER CERTIFICATION

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I Want My Two Resources!

BY MICHELLE CORBIN | *STC Fellow*

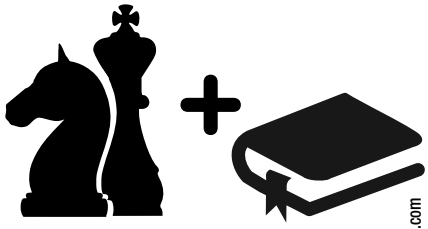
WHEN I'M NOT GEEKING out over the rules of grammar, style, and punctuation, I'm geeking out over the latest Euro-style board game that I learned. These tabletop board games emphasize strategy and downplay luck. A strategy is nothing more than "a plan of action intended to accomplish a specific goal" (Wiktionary). In board games, you build a plan of action based on the rules of the game, then execute the plan in an attempt to win (of course, not everyone's definition of winning is the same, but I digress).

So, let's get back on point. In the game of information development, you need to have a content strategy. What is a content strategy? Kristina Halvorson and Melissa Rach define content strategy in their book, *Content Strategy for the Web*, this way: A guide for "your plans for the creation, delivery, and governance of content" (2012). They define **content components** of a content strategy (substance and structure) as well as **people components** of a content strategy (workflow and governance). At the center is a core content strategy that "defines how an organization (or project) will use content to achieve its objectives and meet its user needs" (2012). The goal of technical editing is to ensure that content meets the user's needs and adheres to the standards and guidelines for the content. So, technical editors should definitely seek to understand their project's content strategy.

In Editing Matters, Michelle Corbin covers matters (topics) about editing that matter (are of consequence) to communicators of all kinds. Watch this space to understand more about editing and what you can do to improve the quality of your content. To suggest a topic or ask a question, contact Michelle at *michelle.l.corbin@gmail.com*.

Because technical editors are all about the content, let's break down the content components of substance and structure. Substance involves knowing your users, knowing the subject matter, and knowing your company's messaging, voice, and tone. Structure involves how you will deliver your content, which forms of navigation you will use, and the underlying metadata that helps define and deliver your content. If the content strategy clearly documents all of these components, then it becomes a fundamental resource for technical editors to use as they edit all of the content.

Please bear (pun intended!) with me as I digress to talk a bit about an overlap between content strategy and information architecture. When Halvorson and Rach mention navigation and metadata, I immediately put on my information architect hat, and pull out "the polar bear book" (there's my pun reference) on the topic, *Information Architecture for the World Wide Web* by Louis Rosenfeld and Peter Morville. Rosenfeld and Morville define information architecture in the context of what an information architect does: "clarifies the mission and vision for the site … determines what content and functionality the site will contain … [defines] its organization, navigation, labeling and searching systems … [and] maps out how the site will accommodate change and growth over time" (1998). I digressed here because technical editors are definitely involved in editing the organization, navigation, labeling, and searchability of the content.



Wiktoria Matynia/Shutterstock.com

Let's get back to the other component of content strategy, the people component, or workflow and governance. Really, these components are the people and processes components, covering the creation, maintenance, and review of the content. In addition to the content strategists, you need an army of folks—technical editors included—to ensure that the content strategy is successful. Technical editors, as the arbiters of quality, play a critical role in helping to define guidelines and templates, and in editing and reviewing the content during content creation and content maintenance. If the content strategy represents the plan (and the rules, to tie it back to my board game analogy), then the technical editors are the ones who validate that the plan is followed, and that the rules are adhered to along the way.

I hope you can see that a documented content strategy is a fundamental resource that technical editors require to be successful. What's the other resource, which my column title hinted at? The style guide, of course.

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Understanding How Mindset Can Help You Build High Performing Technical Communication Teams

An Interview with Andrew Lawless, Strategic Interventionist, Team Lawless

BY SCOTT ABEL | *STC Associate Fellow*

I ADMIT IT. I've spent a fair number of years working much harder than I needed to with less-than-satisfactory results. Chances are good that you have, too.

I used to be a firm believer in the idea that if you work really hard at something, you will be successful. I don't believe that anymore. While it's true that hard work can lead to success, science provides us with evidence that hard work alone isn't enough to guarantee it. Success is most likely when we assign tasks to the people whose innate skills make them an excellent fit for the job.

In this "Meet the Change Agents" column, I introduce you to strategic interventionist Andrew Lawless. He's a content industry entrepreneur turned performance coach whom I have asked to help us understand how to best build high-performing technical documentation teams.

Scott Abel: Andrew, I'm a big fan of yours, and I have been for several years. Thank you for taking time out of your busy travel schedule to help our audience understand the reasons some teams outperform others—and how we can use science to build teams with the best chances for success.

Before we begin, tell us a little about yourself and your career focus.

Andrew Lawless: I coach leaders of content teams to implement tough decisions without isolating themselves. I have done that for about 30 years in publishing, localization, and technical documentation.

I am certified in Strategic Intervention, which is Tony Robbins' coaching methodology. I am also a certified Kolbe Consultant and a Finalist for the Kolbe Professional Award, which recognizes the top tier of Kolbe consultants for making a difference in leaders and their teams around the world.

SA: What made you chose content industries as your well-defined niche for coaching?

AL: Early on in my work, I learned that the quality of localized content is directly dependent on the source material. In one case, a client had 109 different translations of the same

In the digital age, change happens quickly. This column features interviews with the movers and shakers—the folks behind new ideas, standards, methods, products, and amazing technologies that are changing the way we live and interact in our modern world. Got questions, suggestions, or feedback? Email them to *scottabel@mac.com*.

product name in the English source material alone. U.S.-based salespeople sometimes did not know whether two specification sheets referred to the same product.

What surprised me is that translators and technical writers operated in different worlds. Technology developers did not help matters, either. One example is terminology management. For technical writers, it is equally essential to know deprecated terms as it is to implement preferred terms, yet terminology management on the translation side ignored that vital piece of data for translators for a long time. Deprecated terms were deprecated from localization for a long time—never mind the data exchange standards. People's heads were wired differently. I wanted to change that.

SA: What was the key challenge that you discovered?

AL: Twenty-two years ago, I orchestrated the company turnaround at Berlitz (now Lionbridge) in Central and Eastern Europe and then optimized the way the World Bank localized content for developing countries. At the time, there were very few people that genuinely understood the challenges of automating the entire content value chain—and how to connect a translation management system to a communication satellite. My peer group had five people in it.

However, the real challenge was not technology. It was user acceptance and adoption. It still is. The first workshop on automating global content was a collaboration between Alison Toon (then Globalization Director at Hewlett-Packard) and me. Change management was a dominant module from day one, and I initially incorporated change leadership lessons that I learned from Ronald Heifetz and Richard Hackman at Harvard Business School.

These great thought leaders gave me unique insights, but their tools and implementation advice were not practical enough for me. I eventually developed my own, learned how to master influence from Tony Robbins, and gained additional perspectives when I worked as a consultant to the Global Hostage-Taking Research and Analysis Program of the Federal Bureau of Investigation's Behavioral Science Unit.

SA: What did you learn from your pioneering process automation for content development and translation?

AL: My most significant learning about modernizing content development was that it is not just about processes and hand-offs. I spend most of my time coaching managers that automation is equally about people and relationships. Automation projects fail, because people perceive the pain of change to be stronger than the pain of working the way things currently are. Coupled with the real possibility of automation killing jobs, there is often little incentive for teams to change.

There are two basic forces that determine our behavior:

- The need to avoid pain
- The desire to gain pleasure

The need to avoid pain is always the stronger one. That's why well-meaning managers experience push-back from their teams when they introduce new ideas with the best of intentions of building a better future. The two big questions in everybody else's head is: "Will I be good enough, and if I fail, will I get fired?" Either way, in their mind, their own future might not be so bright.

SA: You call yourself a strategic interventionist, a term popularized by life coach and best-selling author, Tony Robbins. What is a strategic interventionist, and how does it help team managers?

AL: What I learned from the FBI is that you can convince a hostage-taker to surrender knowing that he or she will face the death penalty. I figured that if I could make a criminal put down a gun, I can motivate a technical writer or translator to give up unstructured authoring. I wanted a tool and a methodology that works fast; one that achieves breakthroughs in an hour, not in a year.

Most coaching approaches work well if you believe in them, but they take too long. Ron Heifetz' work on change management has influenced me very much, but his frame of reference is Moses wandering around in the desert for about 50 years to figure out how Israelites can become a self-governing society after their escape from Egyptian slavery. In 2002, my time frame was five months, in 2012 it was five days, and now it's five hours. In reality, you have five seconds to build rapport when you want to change someone's behavior.

Strategic Intervention is the most potent toolset you can find in behavioral science. It is aimed at identifying and disrupting beliefs and behavioral patterns that once served us, but no longer do, and then replacing these with new and more helpful ones. It also fundamentally pre-supposes that all people have the right to dream, the desire to give their gift to the world, and all the resources they need to achieve success.

Once you understand all of that, you will stop convincing people with facts. You will approach change management differently. You change perceptions and mindsets instead—including your own. My research indicated that Strategic Intervention is the most practical and applicable approach. I also believe that if you want to learn something, you should learn from the best, so I went through certification by two of the co-founders of strategic intervention, Magali and Mark Peysha.

SA: Andrew, some technical communication shops (and by extension, translation and localization teams) struggle to master the art of collaboration. When they organize themselves into groups and fail to produce the results they desire, team members

sometimes blame their lackluster performance on inadequate funding, a shortage of time, or the wrong tools. While all of these things can impact the ability of teams to be collaborate effectively, these challenges are seldom the main reason a team fails to perform at its best.

What is the most overlooked factor in building a high-performing team, capable of working together to achieve its goals?

AL: Resourcefulness. There will never be enough money, time, or product features to get things done in a way that satisfies everybody. How we use existing resources to get us the results we want is critical.

However, when we perceive a project as going wrong, we tend to focus on the negative. Who caused the issue? Who is to blame? Whom can we charge? Who else pays for this? What stop-gap measures did we forget? And so on.

Resourcefulness means spending 80 percent or more on the solution and 20 percent or less on the problem—and only if it is useful in finding a solution. Most teams do the opposite. They might call it triaging, but it's typically focused on what is *not* working.

As with everything in life, we have choices. We can focus on all the struggles and worry about the challenges we face. All it does is bring us down. We will find more evidence that gives us reason to be anxious—a bundle of nerves at our brain stem makes sure of that. It allows our minds to focus on only those pieces of information that we deem important. That's why you see more silver Toyotas on the street once you have purchased one yourself. It is also the reason you start hearing a word all the time when you've just learned it. That's where your focus is.

This bundle of nerves is called the Reticular Activating System (RAS). The RAS makes you see more of what you are focused on and determines how you feel about your situation. Your emotions cause you to take specific actions, and your actions create results.

If you believe that structured authoring is the worst thing ever, you will find all the reasons to support that belief. And guess what is easiest to pinpoint? That's right, not enough time, money, and features. It always works, because by definition, these are not abundant in projects.

If, on the other hand, you believe that structured authoring is a blessing, your RAS will filter through all evidence to support your conviction. You will get more proof, better ideas, and greater creativity in making it work.

Change your focus, get different results.

SA: Like you and some of the readers of this magazine, I'm a participant in Strategic Coach, a "sky's-the-limit" growth-focused entrepreneurial program designed to help us build a company—and a life—that's meaningful, productive, and prosperous. It was during my coaching sessions that I first discovered a concept about which I had no previous knowledge: the *conative*. It's a hot topic in the behavioral sciences arena, but a foreign word to many others—even my spellchecker doesn't recognize it as an English word.

Can you talk a bit about the conative (what it is, and why it's important?)

AL: Whenever I ask a group of leaders if they had ever taken a time management course, about 80 percent say "yes." When I then ask who is using what they learned, most hands go down. Isn't it interesting that there is a multi-billion industry around a product that only a few people use? Why is that? These products are thought through very well, and the buyers highly educated.

It is also true that knowledge is not power, it's just *potential* power. Only knowledge in action produces results. Every ultra-successful person will tell you that *doing* is more important than *knowing*. That's why many millionaires and billionaires are college drop-outs.

Knowledge sits in the cognitive part of the mind. But it's the conative that determines how you take action. The sequence you use to solve problems is most likely always the same. Some people begin the solution-finding process with researching data, others first brainstorm possibilities, while a third group of people organizes information in their initial move. Some people build on experience, others are only focused on the future, while others have interest just in the here and now.

All of us are born with our natural way of doing things—and in 97 percent of all people, this won't change in their lifetime. The problem is that neither schools nor most workplaces account for that, but we believe that this is normal, and we often tell ourselves a story that we are not good enough—self-confidence fades, or we just burn out. Understanding the conative part of the mind helps us to find out who we truly are and to create a new normal for us.

SA: How do we determine our true normal?

AL: The surefire way of determining your natural strengths is to take a Kolbe A™ Index test. Designed by Kathy Kolbe, this instrument quantifies your natural talents and gives you the best possible understanding of your own instinctive strengths.

The report gives you detailed insight into your conative profile: How you gather and share information, arrange and design work and life, deal with risk and uncertainty, and handle space and tangibles.

SA: What can we learn about ourselves from our own Kolbe scores?

AL: The conative part of your mind sits in an area of the brain where there is no capacity for language. That's why it takes so long to figure out who you are and how you "tick." In

the absence of words, we rely a lot on artists to provide additional meaning. We need musicians to put it in sounds, painters in pictures, sculptures in stone, actors in play, and so on.

Kathy Kolbe reduced a lifelong discovery process to a 15-minute questionnaire that produces amazingly accurate results and gives a framework and terminology for the conative part of our mind. Dan Sullivan of Strategic Coach claims that the day he got his Kolbe result was one of the most liberating days of his life. Most people feel that way.

Kolbe Wisdom gives you the power to be yourself at work and in life. It helps that its terminology and wording are judgment-free. For example, I no longer think that I am not good at developing complex workflows. I now know that I am just excellent at finding shortcuts and efficiencies. Instead of learning how to organize my time, I now focus on reducing efforts and getting more done with less. Likewise, my clients find themselves only managing projects for which they are the best qualified and not wasting time on commitments for which there provide little value.

SA: How might a technical documentation team (undergoing a transformational shift in the way they work) use Kolbe to become a lean, mean, content-producing team?

AL: Kolbe Wisdom teaches how to use everybody's strengths rather than zeroing in on their weaknesses. The writer who makes an argument for what should stay the same in the authoring process probably just wants to stabilize operations. Find a way for them to use that strength during transformation. They will save the innovators from themselves.

The person who does not follow rigid authoring processes is the person who most thrives on finding efficiencies in workflows. The two should never try to agree on a process. One should create the plans, the other should look for ways to streamline it. Innovators often give impractical options; stabilizers are great at weeding them out. One sells ideas to budget holders; another is good at modifying them for general acceptance in the team.

Some writers are great at researching and reviewing massive amounts of information and then developing a document map and authoring strategy. Others are easily overwhelmed by too much detail, but these are the writers that create the best headlines, summaries, or Quick Installation Guides.

Once you have a Kolbe Index, you can create a comparison report that will give each team member detailed advice on how to best work together and the biggest mistakes that they can make as a team.

SA: At The Content Wrangler, we use the Kolbe score to help us understand the inherent strengths and weaknesses of our team members. We try not to assign tasks to people who aren't wired for the work in need of completion. If you could only give one piece of advice to a technical documentation team lead or manager on a quest to create a high-performing team of collaborating technical content creators, what would that be?

AL: See your team members' world through their eyes, and give them information in a way that they can act. In my workshops, I often hear from managers that they wish their teams would work the exact way they want them to. That is ill-advised, because you are likely asking them to work against their grain. Instead, give your team members the freedom to be themselves. Focus on their strengths.

SA: What types of tools are available to help technical communication managers leverage Kolbe wisdom to create high performing documentation teams?

AL: On the high end, they get a full 80-page team analytics report that tells them which team members are at risk of burning out, because they cannot apply their strengths at work. It also gives a reality check on how productively and efficiently a current team is functioning. A team alignment guide provides in-depth advice on how to manage and coach the team through success.

At the very minimum, they get coaching reports for each team member.

Some of my clients use Kolbe Wisdom to hire the right talent for their teams. Research has shown that the actual on-the-job success of new hires is about 83 percent when using Kolbe's talent solutions. That contrasts with an average hiring success of about 20 percent. Think about it, 50 percent of new hires leave within 18 months. Of the remaining 50 percent, less than half produce at the level a team lead needs. What if you knew the probability of success for a new hire in advance? Kolbe RightFit gives you that amount of certainty.

SA: For those who haven't yet discovered your company, Team Lawless, where are the best places for our readers to find you?

AL: You can visit my website (*www.teamlawless.com*) and schedule a Perform-at-Peak-Strategy Session. Most people get absolute clarity within just 55 minutes and leave with a concrete action plan.

You can also connect with me on LinkedIn, *https://www.linkedin.com/in/lawlessandrew/*.

SA: Andrew, thanks for making time to share what you've learned with our readers. The guidance you provide here should be both interesting and useful to those seeking to create and manage high performing technical communication teams.

AL: Thank you, Scott. You have made such a significant impact on technical communicators for so long. I am honored by your terrific questions and the time you gave me. Work hard, be nice, and stay amazing.

Doing More with Less: Tools and Strategies in Communication

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BY THOMAS BARKER | *STC Fellow*

TECHNICAL COMMUNICATION has always been about the stuff of technology and how humans put digital technology to work. Past studies have identified the human activity of using technology as "a productive state that is truly reasoned" (Miller 1989). This distinction was first made by Aristotle in the *Nicomachean Ethics*. Sidestepping the question of ethical behavior (persons using technology for the good), the idea of persons using technology for the practical has a long tradition in STC's *Technical Communication* journal, *Technical Communication Quarterly*, and in various book chapters. Current ideas about the technique and materials of communication and work (screens, connectivity, community building, content curation) begin to look to alternative ways of viewing the objects we use. Maybe by following the reasoning used in the material culture of hunter-gatherers, we can finally do more with less.

Ideas about communication materials frame our interaction with technology, not in terms of material objects, but in terms of performance, poetics, and storytelling. How can this be? Robin Ridington explains how in "Dogs, Snares, and Cartridge Belts" in *The Social Dynamics of Technology* (1999.) The article comments on ways people use thinking, itself, as a technology. Ridington ponders just how much "stuff" (artifacts) we need (or don't need) to do our work. More interestingly, the question becomes how our stuff is embedded in what Ridington calls a "thoughtful social artifice." A thoughtful social artifice would be something like an organization or a group. How much stuff, including computer manuals, do we need to accumulate and use in order to create the organizations, groups, communities, teams, relationships, networks, and other social structures of our lives? Does our information repository clog our thinking?

For technical communicators, that last question might be rephrased in this way: How much information do we have to artfully provide for our readers so that those readers can enact a satisfying experience in their work or occupational setting? Consider that by producing text, content, lists, stories, etc., we are adding to the ever-accumulating repertoire of instruments and tools. If Ridington is right, there is a range, or better, a *ratio* of accumulated tools to strategic outcomes. Now we ask: how much stuff do we need to accomplish what task? Could it be that less is more?

Thinking About Less

The concept of "less" has a long pedigree in thinking about tools and strategies in communication (Carroll 1998). Lest we forget, the academic community has long grappled with what are the bare minimum of words—and other word-based structural and content-wrangling elements—needed for our readers to get the job done.

This column focuses on a broad range of practical academic issues from teaching and training to professional concerns, research, and technologies of interest to teachers, students, and researchers. Please send comments and suggestions to column editor Thomas Barker at *ttbarker@ualberta.ca.*

Thus, within the nexus of "less is more" vs. "more is more," it might be instructive to follow Ridington's reasoning processes: what's really going on when we ponder the information content of our communication artifacts?

Ridington begins with a premise that the cultural message—the significance of cultural-embedded action—is constituted not by the physical product but in the stylized rendering of it. In doing so, the author distinguishes between the product (i.e., spreadsheet or document) and the enactment of culture, the—"thinking shaped by culture"—that someone, some maker, had to enact in the making. For Ridington, this premise leads to the next idea, which is that technology is behavior.

If we accept the idea that, as Ridington asserts, both industrial and non-industrial economies use artifice (e.g., chop sticks) as a means of interacting with the environment (e.g., lunch), then where are we? Knowledge and performance involve strategies in all realms. But here is a key difference: the amount of "stuff" needed to get the job done varies tremendously. Consider that the survivalist with an axe has a lot less to handle than the student, the attorney, or the teacher, thinking just in terms of the sheer volume of tools at their disposal. For some, "less is more" means a simpler object but, as Ridington points out, not simpler thinking. Thinking is where technology use becomes complex.

In fact, Ridington even suggests that thinking in stories, narratives, procedures, and processes—all the stuff of technical communication—becomes more complex when the tools themselves become simplified. In this regard, we might wonder if "less is more" means less tool, more headache. The key to unraveling this mystery has to do with how we see the relationship of our readers—technology "thinker/users"—to their goals of social and cultural effectiveness. For most software and hardware users, wrangling the tool in a thoughtful way means that they know, respect, and understand the cultural constraints that shape their work. Like hunter-gatherers, to use an example Ridington uses, they respect the animals they have to work with, even give them souls. In the realm of technical communication, this giving of being-ness, autonomy, or soulfulness to the material environment constitutes the productive relationship that we all seek. It is the goal of technical communication.

But there is more. If we can accept *material* and *culture-embedded performance* as the components of the productive application of technology, what's next? How can the material (information products) most efficiently facilitate the social, cultural, and workplace significance that we all crave? To answer that question, we need to examine a notion called "strategic complexity." Ask yourself, "Is the complexity of an artifact simply in the *number* of interlocking parts (topics, concepts, systems) it has, or in the strategic complexity of how the artifact is used?"

Strategic Complexity

To illustrate the definition of strategic complexity, Ridington turns to the artifact of the story, or narrative in general. Strategic complexity is a type of cognitive measure of how people use social skills in response to environmental challenges. Consider a child trying to reach a forbidden cookie. Boxes, pillows, and pets might come to mind as possible technologies for boosting a small body closer to the jar. How much more complex, however, are the social skills being used? Thinking in adult terms, how much more complex is the thinking behind initiatives (projects, enterprises, proposals, evaluations, and so on) than the paper they are drawn out on? The thinking—culturally sensitive reasoning and observing—going on here dwarfs the copper wire or keyboard through which, or on which, the culturally embedded practice occurs.

One way to view tools, then, is not in terms of how complex their working parts are, but how much strategic complexity they engender. The more the task resides in the mind of the user, the less of the task has to be facilitated by materials (like help systems or user forums). This might be good news for technical communicators, always trying to make the most of their 26 basic tools.

In closing, reflect on what axioms lie behind the less-is-more approach to technological depictions.

- Axiom # 1: Technology is more in the thinking than in the object.
- Axiom # 2: The thinking about objects is more complex than the objects themselves.
- Axiom # 3: Technology is a system of relations with fellow humans.

We are all culturally-bound citizens, community members, workers, family members. As such, the vastness of thinking—processes, norms, values, ethics—deserves attention. These instances of strategic complexity reflect our problem-solving, our health, our identity. It's comforting—and a little unsettling—to think that computers are less complex than the societies in which they are put to use, but it may just be the case that less—less institutionalized, systemized knowledge—is more. We sift through and try to understand our products, and although cultural complexity may not be reflected or embodied in a particular artifact, it is relevant to the understanding of it.

RESOURCES

Carroll, John M. *Minimalism Beyond the Nurnberg Funnel.* Cambridge, MA.: MIT Press, 1998.

Ridington, Robin. "Dogs, Snares, and Cartridge Belts: The Poetics of a Northern Athapaskan Narrative Technology." *The Social Dynamics of Technology: Practice, Politics, and World Views*, 42.2:167–185, 1999.

Miller, Carolyn R. "What's Practical about Technical Writing." *Technical Writing: Theory and Practice*, 14–24, 1989.

Mark Your Calendar

Organization Events Across the Globe

FYI lists information about nonprofit ventures only. Please send information to *intercom@stc.org.*

1 24-26 Mar
The 60th annual **Spectrum STC Rochester Conference** will be held 24-26 March 2019 at the Rochester Institute of Technology, Rochester, NY. This year's theme is "Remember yesterday. Celebrate today. Plan for tomorrow."
http://stc-rochester.org/spectrum-conference/
spectrum@stc-rochester.org

2 5-6 Apr
The annual **Conduit STC-Philadelphia Metro Chapter Mid-Atlantic TechComm Conference** will be held 5-6 April 2019 at the Franklin Institute in Philadelphia, PA.
https://www.stcpmc.org/conferences/conduit-2019/
conference@stcpmc.org

3 11-14 Apr
The 33rd annual **Association of Independent Information Professionals (AIIP)** conference will be held 11–14 April 2019 at the Wyndham Philadelphia Historic District hotel in Philadelphia, PA.
AIIP
https://www.aiip.org/conference

4 11-15 Apr
The International Society for Performance Improvement will be holding its annual conference 11–15 April 2019 at the Intercontinental Hotel in New Orleans, LA.
ISPI
https://www.ispi.org/ISPI/Conference/

5 25-27 Apr
The American Society for Indexing (ASI) will hold its annual conference 25–27 April 2019 at the Saguaro Scottsdale in Scottsdale, AZ.
ASI
https://www.asindexing.org/conference-2019/

6 5-8 May
The 66th Annual **STC Technical Communication Summit & Expo** will take place 5-8 May 2019 at the Hyatt Regency in Denver, CO.
https://summit.stc.org/
summit@stc.org

* STC-related event

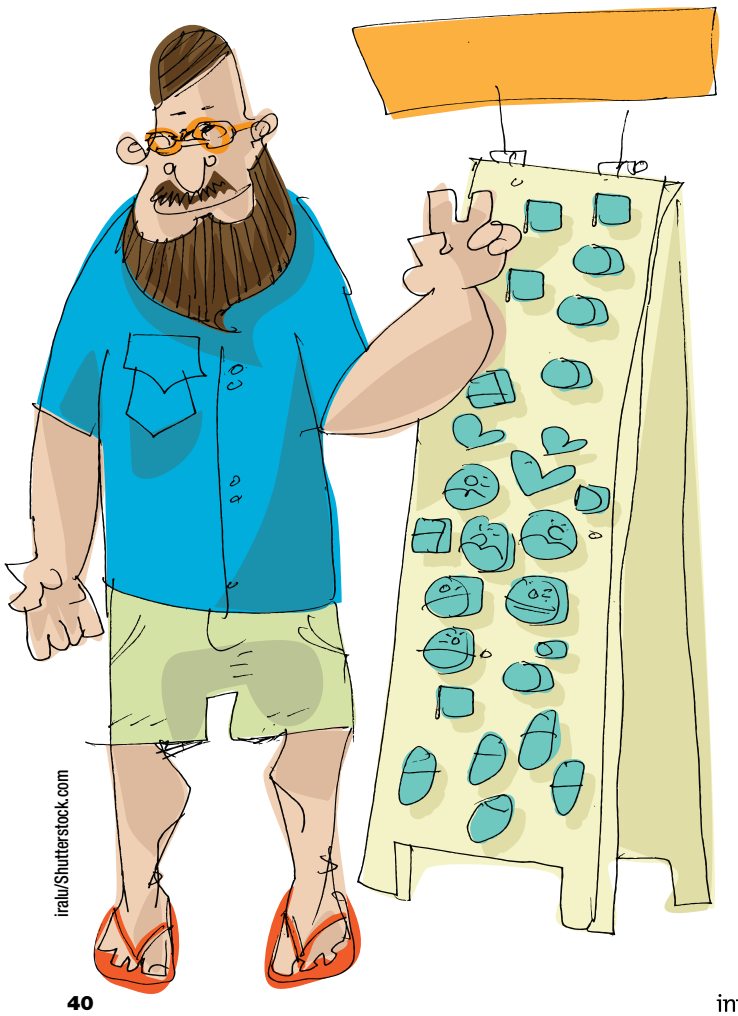
Selling Slogans

BY JOHN V. HEDTKE | *STC Fellow*

I'VE ALWAYS HAD A FONDNESS for tacky humor. This comes as no surprise to anyone who knows me: "New heights in low taste" is a working motto for me, right after "Don't ask me; I'm making this up as I go along."

About 20 years ago, I was at a client site, and I saw a dozen novelty buttons with really funny slogans on someone's cube wall. I asked him about them, and it turned out that he'd written the slogans and sold them, to a friend of his he'd known for years, a guy named Jim who runs a button/bumper sticker/refrigerator magnet company called Duck and Cover. Jim was always on the lookout for good slogans, and he paid a flat fee for each one he used and sent a handful of buttons as well.

Well, shooooot, I liked the sound of that! Jim said the process was this: I'd send him button ideas that weren't already being used on buttons, bumper stickers, coffee mugs, etc. (If I could find it on the Internet, it was probably not saleable.) If he liked them, he'd add them to a list of potentials. After he'd accumulated about 200, he'd send the list out to a dozen reviewers whose opinions on marketability he'd learned to trust. They'd mark the ones they thought would sell. He'd purchase those and make buttons, bumper stickers, and refrigerator magnets with the slogans.



iralu/Shutterstock.com

I started sending in *lots* of slogans. We discovered my hit rate for successful slogans was about 1 in 9. Was that good? I asked. Definitely, he replied; he had writers who only had one good slogan in 50 or 100 submissions.

Over the last 20 years, I've sold over 50 slogans. Some of the cleaner slogans I've come up with are:

- I've suffered for my art; now it's your turn.
- Death is nature's way of telling you to turn off the computer.
- Failure is not an option—it already comes bundled with the software.
- There is a very fine line between a hectic day and a panic attack.
- It doesn't pay the rent, but it's a lot of fun.
- My spirit animal is the gummy bear.
- How'd you like to curl up in bed with the author of a good book?

I understand that one of my buttons inspired Hillary Clinton at a stump speech in Aug 2016 or so. My all-time most popular button is "I never thought I'd miss Nixon," which came out in January 2005. Jim made it into a button, a refrigerator magnet, and a bumper sticker. Since then, other companies have stolen this phrase (mostly for bumper stickers) and also sold it. (It's very popular!) It's still in print, which is unusual: most slogans get cycled out after a year or two. But someone was wearing that button on her coat when she met Clinton prior to the speech. Clinton admired the button, and the woman gave it to her. Clinton put it on and did her speech, but at the end she talked about the button and extemporized a few paragraphs on that theme. (I've a number of mutual friends with Clinton, so I'll have to get hold of her and tell her how proud I am that she used my button.)

Writing and selling slogans gives my basic tackiness a way to take meaningful, profitable shape in today's complex society. And while it's not a living, it's a heck of a lot of fun!

JOHN HEDTKE (john@hedtke.com) *is the author of 27 nonfiction books and 200 articles. When not otherwise occupied, John bakes, writes strange songs, and plays the banjo. John and his amazing wife Marilyn sing together and travel. They live in Washington State. John drinks a lot of coffee.*

TECHNICAL COMMUNICATION

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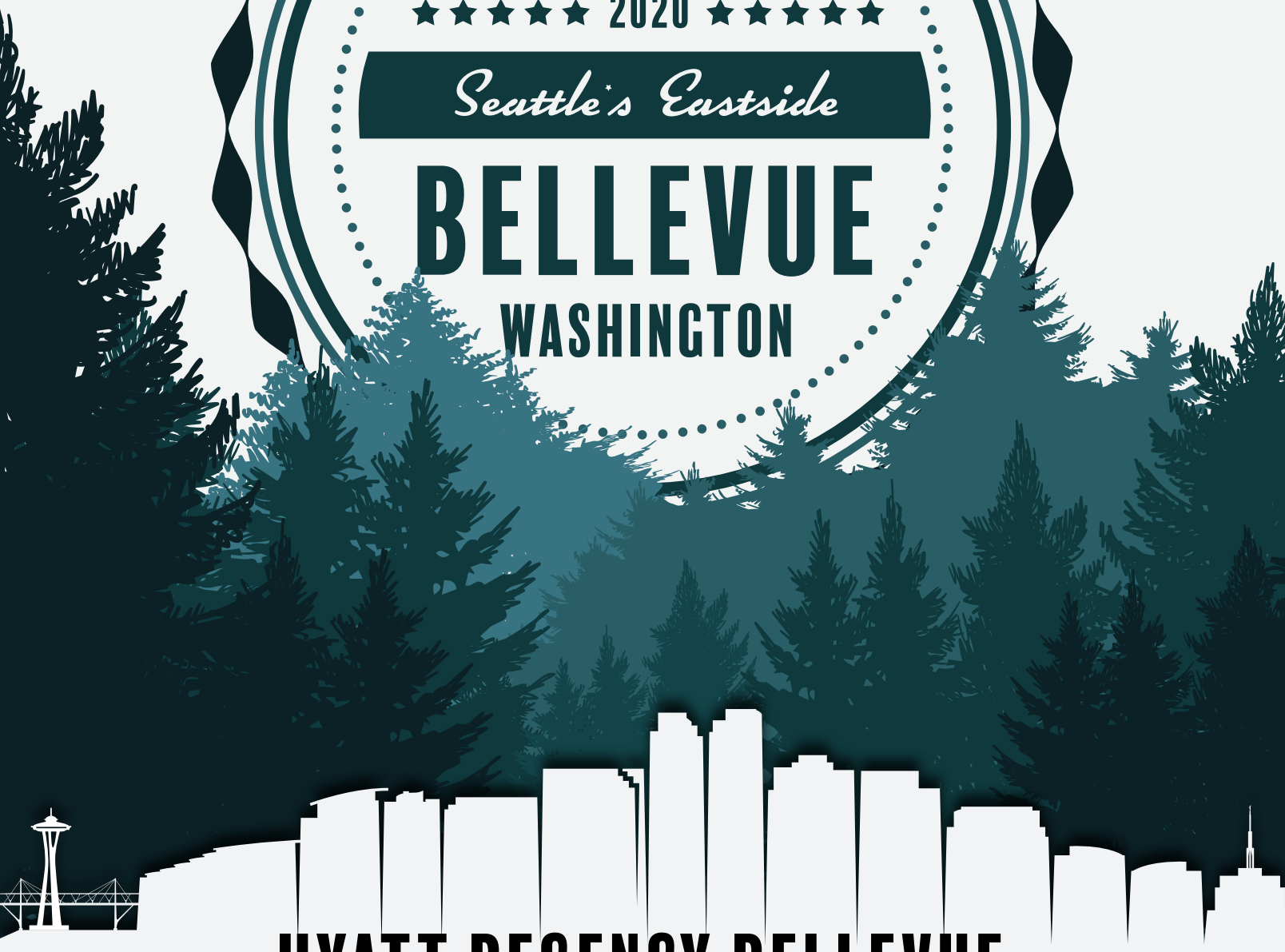

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